

Autowork Online changes and new features

Spring 2017 release

A man with short dark hair and a light beard, wearing a blue work shirt over a white t-shirt, is holding a silver laptop. He is smiling slightly and looking towards the camera. The background is a blurred industrial setting, possibly a car wash or a factory floor, with a car wheel visible. The image is overlaid with a large green and blue diagonal graphic on the left side.

Driving Business Performance

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Introduction

The Spring 2017 update of MAM's popular Autowork Online garage management software introduces several new features designed to help garages operate more efficiently.

A new **Suggested Jobs** feature makes it quicker and easier to build estimates and jobs by recommending work based on symptoms or results from MAM's **CarSide** electronic vehicle health-check (eVHC) app.

The CarSide app has been updated to allow vehicle inspection images and notes to be emailed to customers via the main Autowork Online application.

Autowork Online's **Custom Jobs** feature has been enhanced to cater for fixed-price jobs such as promotions or fleet work. The new **Complete Price** job type will not be affected by the price of its individual components. A further change to the existing job groups system will mean that jobs can be categorised using the same descriptions as those available in the custom jobs screen.

The new **automated SMS** feature helps garages encourage repeat business and reduce time lost due to "no shows". It enables user-defined text messages to be sent automatically for appointments, reminders and deferred work. Up to three messages can be scheduled for each event, which will be automatically delivered at prescribed intervals.

The release also includes several enhancements to existing functionality. The performance of the **work in progress (WIP)** screen has been improved, and its tiles will display the assigned technician. Labour rates set against fleet master accounts are automatically shared to their sub-accounts, and it is now possible to produce a non-priced 'schedule of work' for fleet or insurance work.

Benefits

- Build jobs more efficiently - New **Suggested Jobs** feature allows for a faster workflow
- Improved pricing flexibility - Enhancements to the **Custom Jobs** feature allow for more flexible pricing
- Enhanced performance - The overall speed of the **Work in Progress** feature has been enhanced

Suggested Jobs

The new Suggested Jobs feature allows custom jobs to be suggested in a number of ways. Once suggested, the customer jobs can be added to the document with a single click, or rejected, allowing estimates and jobs to be built quickly and efficiently.

Jobs can be suggested based on three factors:

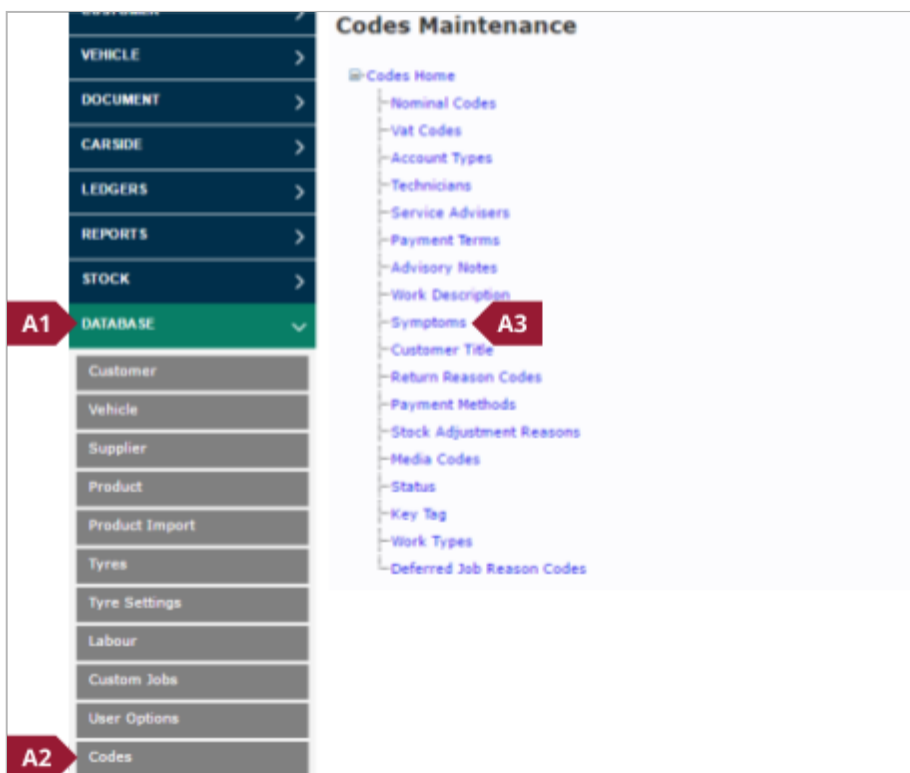
- Manually - Jobs can be suggested manually, for example, by a senior technician or after an inspection.
- Linked to a symptom - For example, the symptom "Squeaky brakes" could suggest the "renew pads" job.
- Linked to a CarSide eVHC result - For example, the vehicle failing on brake pad condition would suggest the "renew brake pads" job.

Configuring Suggested Jobs

Before the Suggested Jobs feature can be used to its full potential, Suggested Jobs must be correctly configured. **Please note** that the required Symptoms and Custom Jobs must be configured before this can be done. Suggested Jobs can be configured using the following process:

Suggested Jobs linked to a Symptom

- From the **Database** menu (A1), select the **Codes** option (A2), and then click the **Symptoms** link (A3).



- B. From the grid, find the Symptom you would like to link a Suggested Job to, and click the plus sign in the **Suggested Jobs** column.

Code

Summary

Description

Update

Cancel

Delete

Code	Summary	Description	Suggested Jobs	Edit
SQK1	Squeaky Brakes	Brakes Squeak or judder when used	+	

B

- C. Select a **Job Category** (C1), and then check the boxes (C2) against any jobs you would like to link. Click the **Okay** button (C3).

Suggested Jobs

Filter

Global

My Jobs

C1

Categories

- Uncategorised
- Specials & Promotions
- Service & Maintenance
- Air Conditioning & Heater
- Brakes 2
- Cooling System
- Diagnosis & Inspection
- Electrical & Battery
- Engine & Performance
- Exhaust & Emissions
- Exterior Interior
- Fluids
- In Car Technology
- Steering & Suspension
- Transmission
- Under Vehicle
- Wheels & Tyres
- Misc

Job Name

Job Description

Type

Price

BRK1	Replace Brake Pads	Complete	100.00	<input checked="" type="checkbox"/>
BRK2	Replace Brake Discs and Pads	Complete	200.00	<input checked="" type="checkbox"/>

C2

Cancel

Okay

C3

Now that this has been configured, the Custom Jobs selected will automatically be suggested when the Symptom is added to a job.

Suggested Jobs linked to an eVHC result

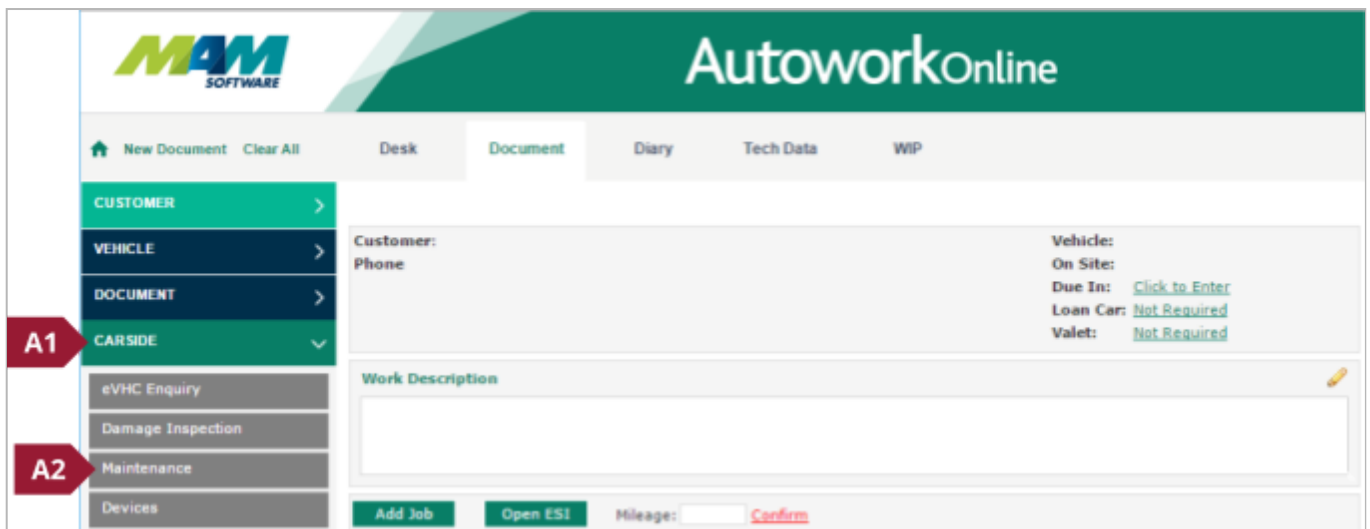
It is also possible to link Suggested Jobs to a particular eVHC result. For example, the "Renew front brake pads" job could be linked to the vehicle failing the inspection for its brake pads.

The Suggested Job will appear be triggered if an amber or red status is recorded for an eVHC item with a linked Suggested Job. The colour of the icon in the Suggested Jobs section of the Document tab (see the [Using Suggested Jobs](#) section of this guide) will change to indicate the severity of the fault.

For added convenience, if you do not assign any custom jobs to eVHC results, a suggestion will automatically be made using the eVHC category and icon which can be used to create a blank job group.

Suggested Jobs can be linked to an eVHC result using the following process:

- A. From the **CarSide** menu (A1), select the **Maintenance** option (A2).



The screenshot shows the AutoworkOnline web application interface. The top navigation bar includes the MAM SOFTWARE logo and the text "AutoworkOnline". Below this is a secondary navigation bar with tabs: "New Document", "Clear All", "Desk", "Document", "Diary", "Tech Data", and "WIP". The "Document" tab is currently selected. On the left side, there is a vertical menu with options: "CUSTOMER", "VEHICLE", "DOCUMENT", "CARSIDE", "eVHC Enquiry", "Damage Inspection", "Maintenance", and "Devices". The "CARSIDE" option is highlighted with a red arrow labeled "A1". Below "CARSIDE", the "Maintenance" option is highlighted with a red arrow labeled "A2". The main content area on the right displays a form for a new document. It includes fields for "Customer: Phone", "Vehicle: On Site", "Due In: Click to Enter", "Loan Car: Not Required", and "Valet: Not Required". There is also a "Work Description" text area with a pencil icon for editing. At the bottom of the form, there are buttons for "Add Job" and "Open ESI", along with a "Mileage:" field and a "Confirm" button.

- B. From the **eVHC Categories** section, select the required eVHC test from the **eVHC Lists** dropdown menu.
- C. From the **eVHC Items** section, select the required eVHC item from the **eVHC Categories** dropdown menu.
- D. Click the blue **plus** button next to the item you would like to associate with a Suggested Job.

Maintenance

Filter Options

Select which jobs to show on your mobile device:

☒ All Work in Progress
 ☐ Jobs booked to Diary

☐ Filter by Status

eVHC Lists

ID	Name	Sort By	Enabled	
1	test	0	False	<input type="checkbox"/> <input type="button" value="Add"/>
2	New VHC	0	True	<input type="checkbox"/> <input type="button" value="Add"/>

eVHC Categories

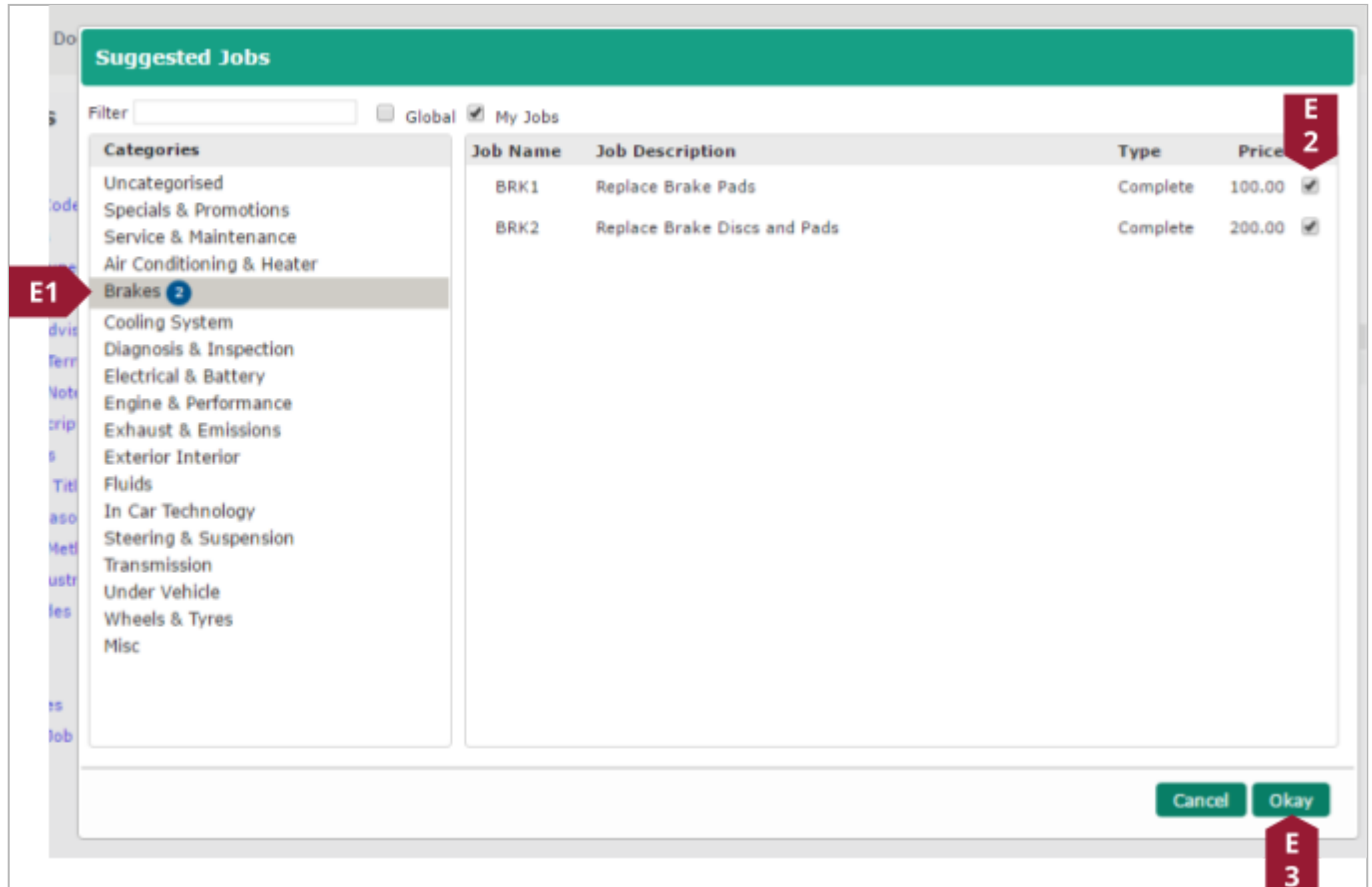
ID	eVHC Lists	Category	Sort By	
3	New VHC	tyres	0	<input type="checkbox"/> <input type="button" value="Add"/>
4	New VHC	Brakes & Wheels	0	<input type="checkbox"/> <input type="button" value="Add"/>

eVHC Items

ID	eVHC Categories	eVHC Items	Sort By	Tyre?	
7	Brakes & Wheels	Front Pads	1	False	<input type="checkbox"/> <input type="button" value="Add"/> <input type="button" value="plus"/>
8	Brakes & Wheels	Front Discs	2	False	<input type="checkbox"/> <input type="button" value="Add"/> <input type="button" value="plus"/>
9	Brakes & Wheels	Rear Pads	3	False	<input type="checkbox"/> <input type="button" value="Add"/> <input type="button" value="plus"/>
10	Brakes & Wheels	Rear Discs	4	False	<input type="checkbox"/> <input type="button" value="Add"/> <input type="button" value="plus"/>

- E. Select a **Job Category** (E1), and then check the boxes (E2) against any jobs you would like to link. Click the **Okay** button (E3).

Now that this has been configured, the Custom Jobs selected will automatically be suggested when the eVHC item they were set against is logged with an amber or red status.



Suggested Jobs

Filter ☐ Global ☒ My Jobs

Categories	Job Name	Job Description	Type	Price
Uncategorised	BRK1	Replace Brake Pads	Complete	100.00
Specials & Promotions	BRK2	Replace Brake Discs and Pads	Complete	200.00
Service & Maintenance				
Air Conditioning & Heater				
Brakes 2				
Cooling System				
Diagnosis & Inspection				
Electrical & Battery				
Engine & Performance				
Exhaust & Emissions				
Exterior Interior				
Fluids				
In Car Technology				
Steering & Suspension				
Transmission				
Under Vehicle				
Wheels & Tyres				
Misc				

Cancel Okay

Using Suggested Jobs

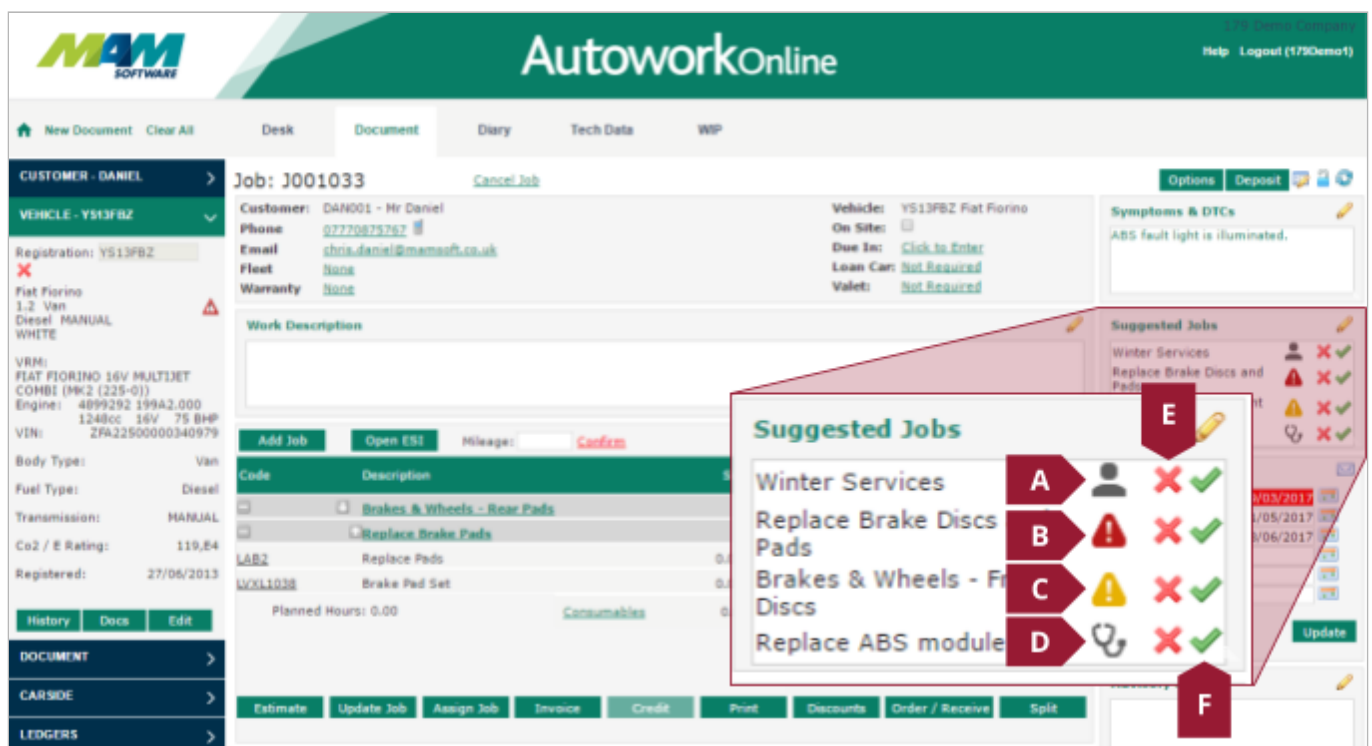
Suggested Jobs can be used in one of two ways: Jobs can be automatically suggested based on Symptoms or eVHC results (see the [Configuring Suggested Jobs](#) section of this guide for more information), or they can be added manually to the job.

Adding Suggested Jobs to a Job in progress

The **Suggested Jobs** section within the Document tab will list all relevant Suggested Jobs. An icon denotes the source of the suggestions as follows:

- A. Manually added Suggested Job.
- B. eVHC Suggested Job (red status).
- C. eVHC Suggested Job (amber status).
- D. Symptom-linked Suggested Job.

Clicking the **Tick** button (F) will add the Suggested Job to the Job in progress, clicking the **Cross** button (E) will reject the Suggested Job.



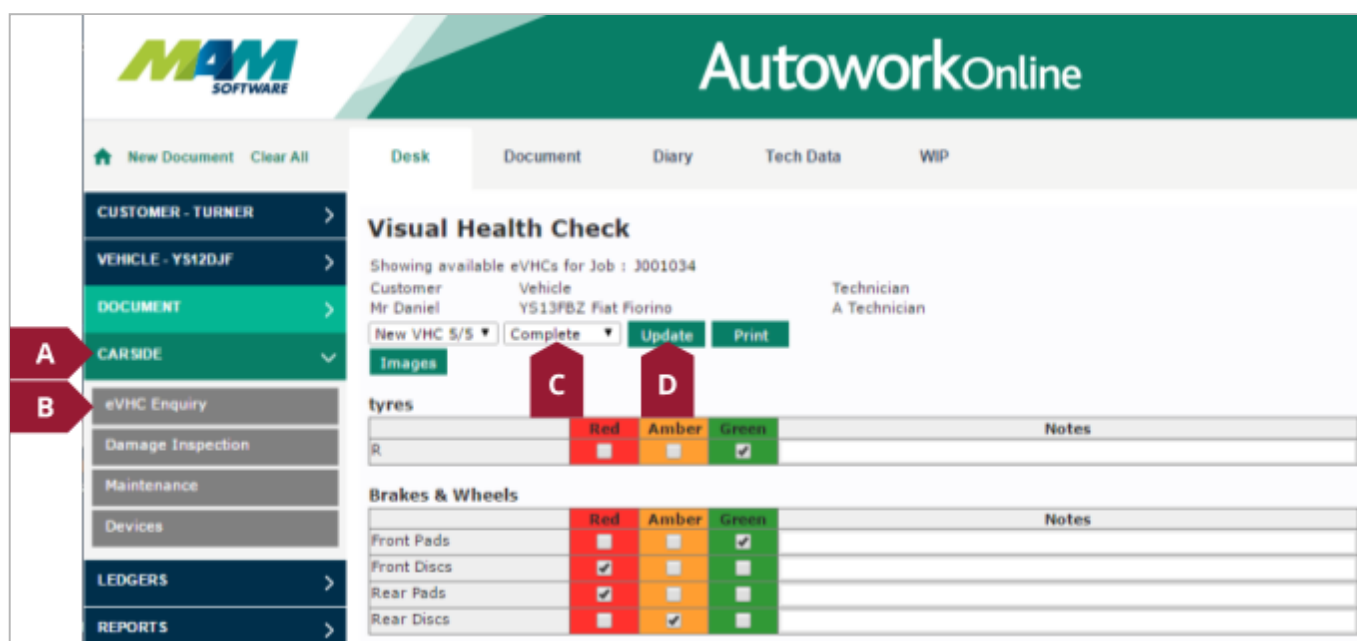
The screenshot displays the AutoworkOnline interface for a job in progress (Job: J001033). The interface includes a sidebar with customer and vehicle details, a main work area with a description and code, and a right-hand panel for suggested jobs. A callout box highlights the 'Suggested Jobs' section, showing a list of tasks with status icons and buttons for adding (F) or rejecting (E) them.

Code	Description	Status	Action
WINTER	Winter Services	Manually added (A)	Reject (E) / Add (F)
REPLACE	Replace Brake Discs and Pads	eVHC (B)	Reject (E) / Add (F)
BRAKES	Brakes & Wheels - Front Discs	eVHC (C)	Reject (E) / Add (F)
REPLACE	Replace ABS module	Symptom-linked (D)	Reject (E) / Add (F)

Adding Suggested Jobs based on an eVHC result

Once an eVHC inspection has been logged, the job must be updated before the Suggested Jobs will display. This can be done as follows:

- Click the **CarSide** menu item.
- Click the **eVHC Enquiry** option.
- Optional: set the **Status** drop-down menu to **Complete** (see the [CarSide Status field](#) section of this document for more information).
- Click the **Update** button.



AutoworkOnline

Home New Document Clear All Desk Document Diary Tech Data WIP

CUSTOMER - TURNER >

VEHICLE - Y512DJF >

DOCUMENT >

A **CARSIDE** v

B eVHC Enquiry

Damage Inspection

Maintenance

Devices

LEDGERS >

REPORTS >

Visual Health Check

Showing available eVHCs for Job : 3001034

Customer Mr Daniel Vehicle Y513FBZ Fiat Fiorino Technician A Technician

New VHC 5/5 Complete Update Print

Images

C **D**

tyres

	Red	Amber	Green	Notes
R	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Brakes & Wheels

	Red	Amber	Green	Notes
Front Pads	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Front Discs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Rear Pads	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Rear Discs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

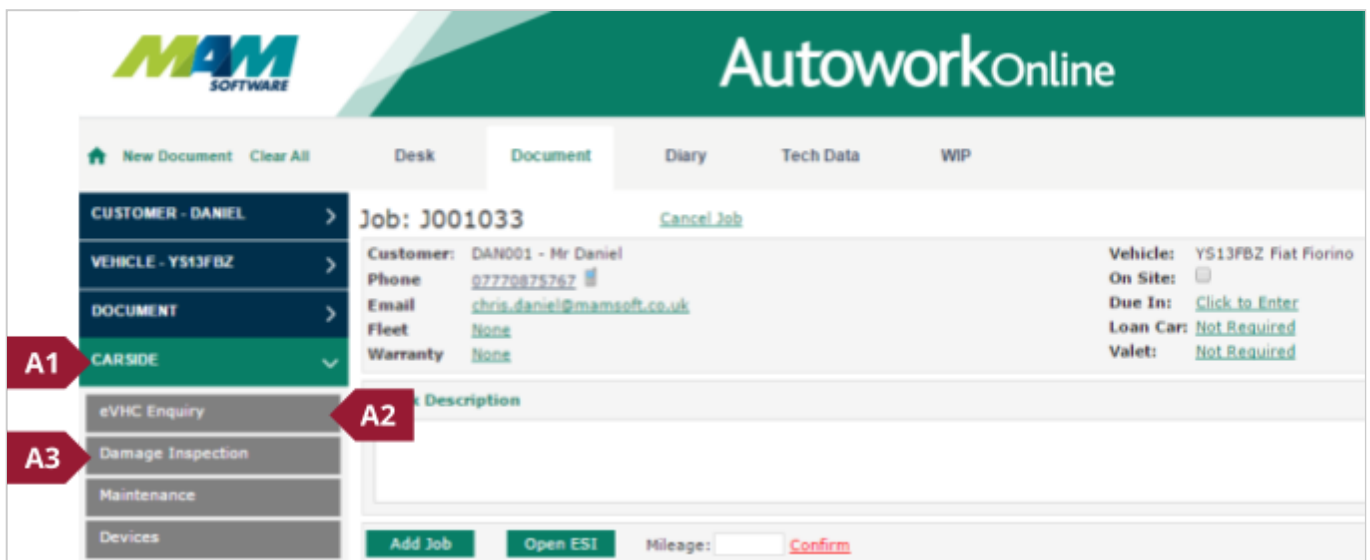
CarSide emailing improvements

The CarSide tablet-based eVHC app has been upgraded to allow users to email inspection images and notes from Autowork Online.

Emailing an inspection image

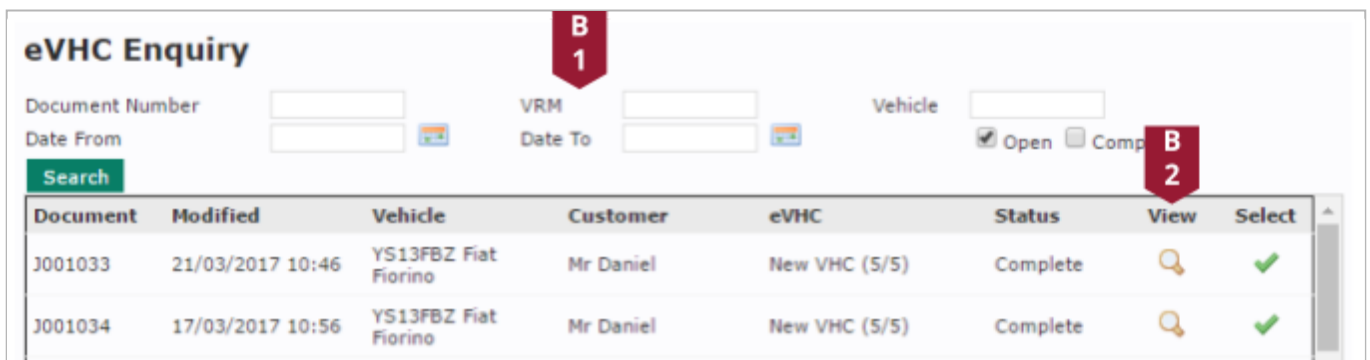
It is now possible to email images from eVHC tests or Damage Inspections, this can be done as follows:

- A. From the **CarSide** menu (A1), select either the **eVHC Enquiry** (A2), or **Damage Inspection** (A3) options.







The screenshot shows the AutoworkOnline interface. On the left, there is a sidebar menu with the following items: CUSTOMER - DANIEL, VEHICLE - YS13FBZ, DOCUMENT, CARSIDE (highlighted with a red arrow labeled A1), eVHC Enquiry (highlighted with a red arrow labeled A2), Damage Inspection (highlighted with a red arrow labeled A3), Maintenance, and Devices. The main area displays job details for Job: J001033. The details include: Customer: DAN001 - Mr Daniel, Phone: 07770875267, Email: chris.daniel@mamsoft.co.uk, Fleet: None, Warranty: None, Vehicle: YS13FBZ Fiat Fiorino, On Site: ☐, Due In: Click to Enter, Loan Car: Not Required, and Valet: Not Required. At the bottom, there are buttons for Add Job, Open ESI, and a Mileage field with a Confirm button.

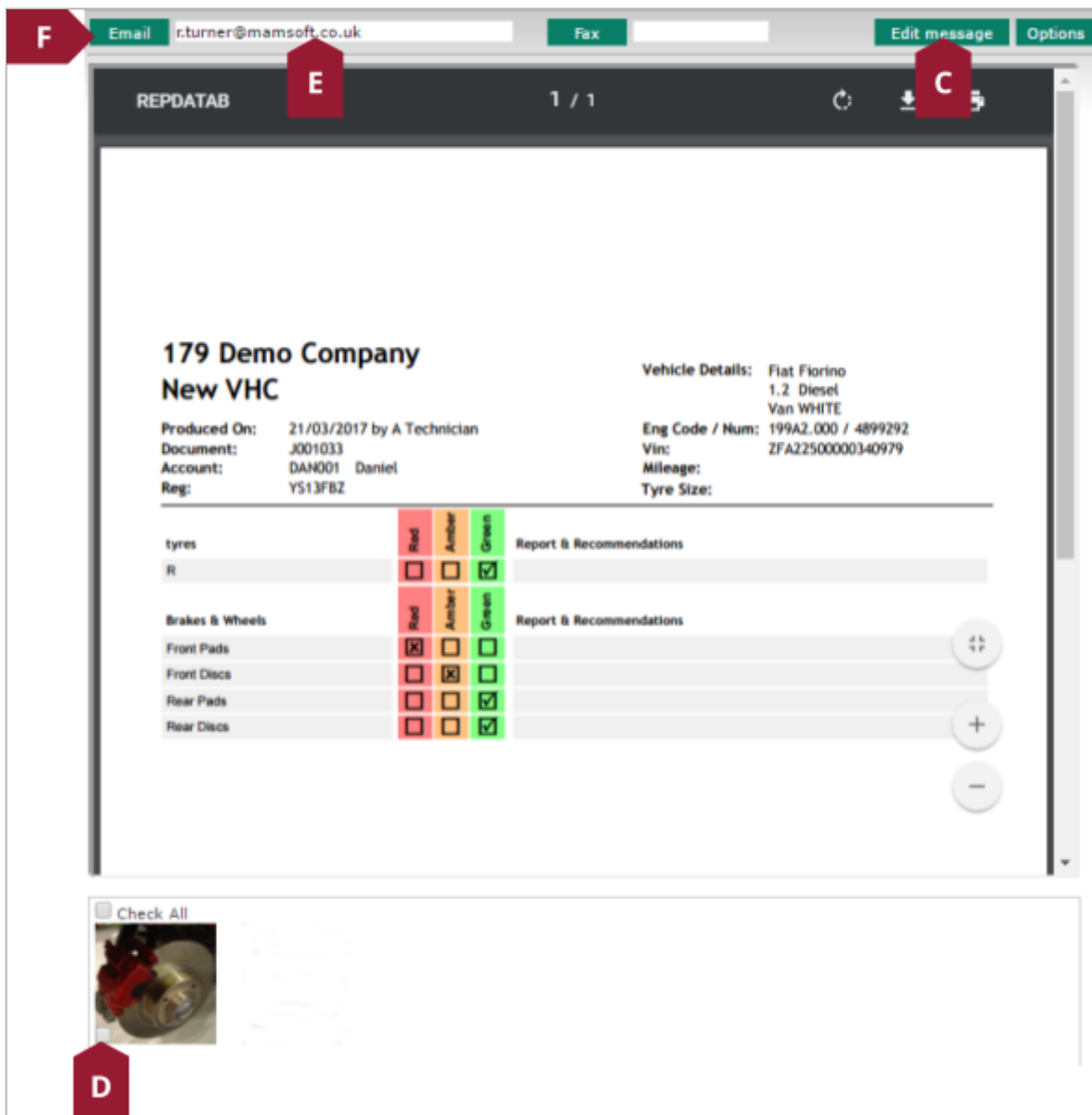
- B. Set the required filters (B1) if required (all items will be shown otherwise), and then click the **View** (magnifying glass) button (B2) against the document you would like to email.



The screenshot shows the eVHC Enquiry search results. At the top, there are search filters: Document Number, Date From, VRM, Date To, and Vehicle. Below the filters is a Search button. The results are displayed in a table with the following columns: Document, Modified, Vehicle, Customer, eVHC, Status, View, and Select. The table contains two rows of data.

Document	Modified	Vehicle	Customer	eVHC	Status	View	Select
J001033	21/03/2017 10:46	YS13FBZ Fiat Fiorino	Mr Daniel	New VHC (5/5)	Complete		
J001034	17/03/2017 10:56	YS13FBZ Fiat Fiorino	Mr Daniel	New VHC (5/5)	Complete		

- C. Optional: click the **Edit Message** button, and then change the message text in the popup. This text will appear in the body of the sent email.
- D. Optional: check the boxes (D) against any images you would like to include. These images will be sent as email attachments.
- E. Check that the email address is correct. By default, the on-file address for the customer will be displayed.
- F. Click the **Email** button to send the email.



179 Demo Company
New VHC

Produced On: 21/03/2017 by A Technician
Document: J001033
Account: DAN001 Daniel
Reg: YS13FBZ

Vehicle Details: Fiat Fiorino
1.2 Diesel
Van WHITE
Eng Code / Num: 199A2.000 / 4899292
Vinc: ZFA22500000340979
Mileage:
Tyre Size:

	Red	Amber	Green	Report & Recommendations
tyres				
R	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Brakes & Wheels				
Front Pads	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Front Discs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Rear Pads	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Rear Discs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

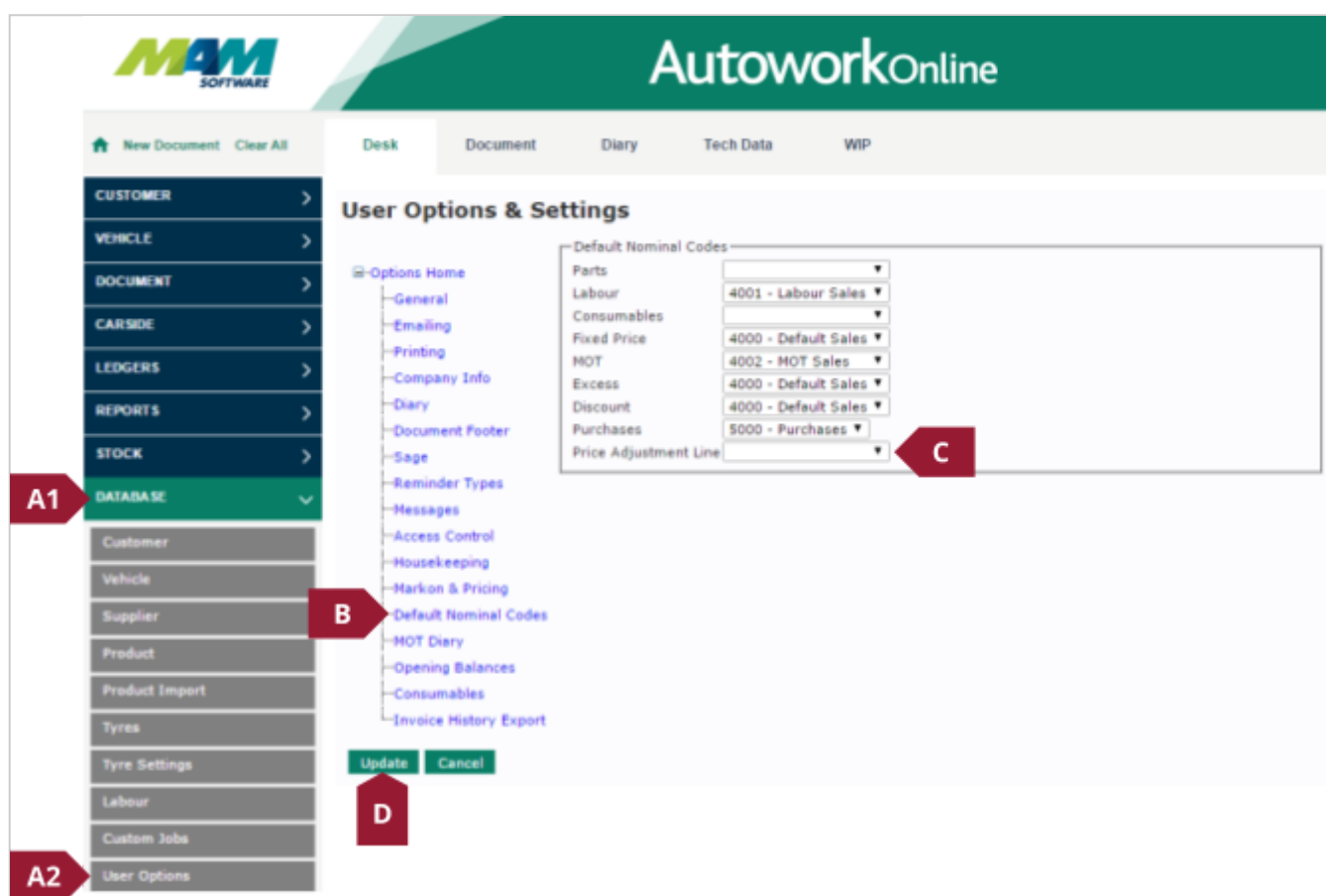
Check All

D

Configuring a default nominal code

It is recommended that price adjustment lines are set to use a specific nominal code for reporting and export purposes. This can be configured as follows:

- From the **Database** menu (A1), select the **User Options** option (A2).
- Click the **Default Nominal Codes** link.
- Select the required nominal code from the **Price Adjustment Line** dropdown menu.
- Click the **Update** button.



Custom Jobs Complete Pricing option

A new Complete Jobs pricing structure has been added to the Custom Jobs screen. This works in a similar way to a Fixed Price job, but the lines can be priced individually, allowing the true costs to be recorded.

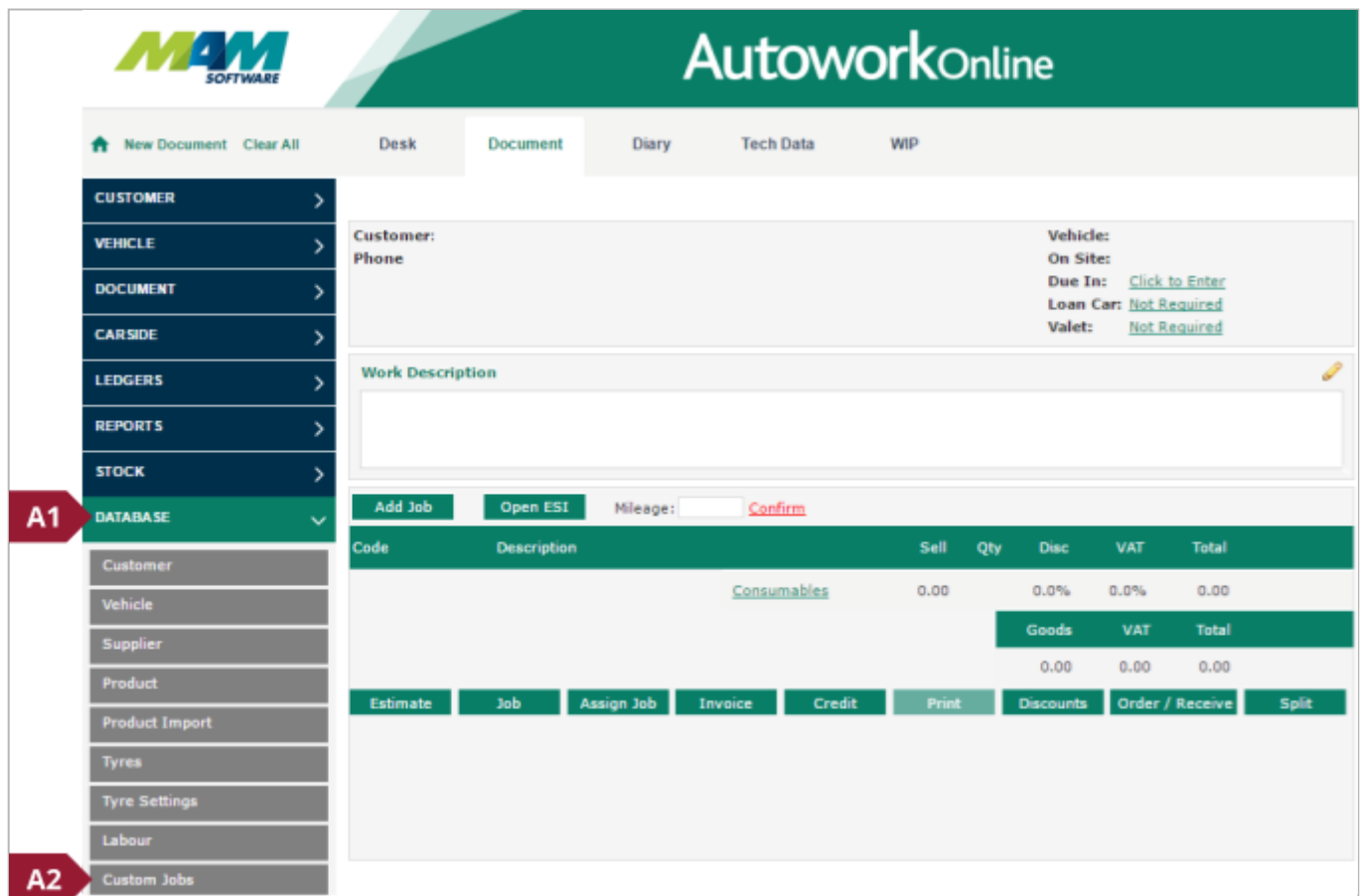
A final selling price for the job is set, and hidden price adjustment lines are created to make up differences in price. When a Complete Price job is printed on a customer-facing document, only the job sub-total price will be displayed, individual part numbers and descriptions will be displayed, but their pricing will be hidden.

The adjustment lines created can be set to use a specific Nominal Code for profit and loss analysis, and exporting to Sage.

Please note: In some cases, margin reports may be affected by the use of Complete Price jobs. The parts and labour totals used in reports will **not** include the adjustment values, but they will be included in the overall profit analysis reports which use all lines of data.


Creating Complete Price jobs

- A. From the **Database** menu (A1), select the **Custom Jobs** option (A2).



The screenshot shows the AutoworkOnline software interface. On the left, there is a sidebar menu with the following items: CUSTOMER, VEHICLE, DOCUMENT, CARSIDE, LEDGERS, REPORTS, STOCK, DATABASE (highlighted with a red arrow labeled A1), Customer, Vehicle, Supplier, Product, Product Import, Tyres, Tyre Settings, Labour, and Custom Jobs (highlighted with a red arrow labeled A2). The main area of the interface is titled 'AutoworkOnline' and contains a 'Customer' section with fields for 'Customer: Phone', 'Vehicle: On Site', 'Due In: Click to Enter', 'Loan Car: Not Required', and 'Valet: Not Required'. Below this is a 'Work Description' section with a text area. At the bottom, there is a table with columns: Code, Description, Sell, Qty, Disc, VAT, and Total. The table contains one row with the description 'Consumables' and values: 0.00, 0.0%, 0.0%, 0.00. Below the table, there are buttons for 'Estimate', 'Job', 'Assign Job', 'Invoice', 'Credit', 'Print', 'Discounts', 'Order / Receive', and 'Split'.

- B. Enter a **Job Name**, **Description** (C), **Nominal Code** (D), **Category** (F), and **VAT Code** (G). Set the **Price Type** dropdown menu (E) to **Complete Price**, enter a **Selling price** (H), and the **Type** dropdown menu (I) to **PG - Product Group**.

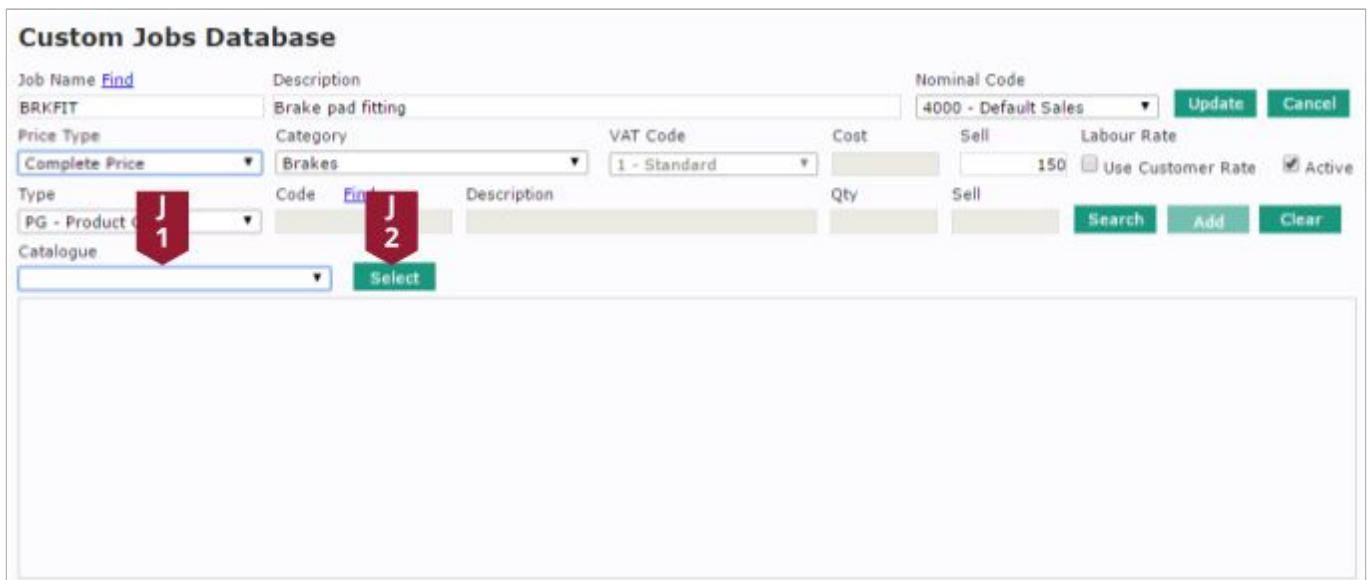


The screenshot shows the 'Custom Jobs Database' form. Annotations B through I point to the following fields:

- B**: Job Name field
- C**: Description field
- D**: Nominal Code dropdown menu
- E**: Price Type dropdown menu (set to 'Complete Price')
- F**: Category dropdown menu
- G**: VAT Code dropdown menu (set to '1 - Standard')
- H**: Sell price field (set to '150')
- I**: Type dropdown menu (set to 'PG - Product')

Other visible fields include: Code, Description, Qty, Sell, Labour Rate, Use Customer Rate, Active checkbox, Trade Price, Cost Price, and buttons: Update, Cancel, Search, Add, Clear.

- J. A new **Catalogue** dropdown menu (J1) will appear, set this to the required product group, and then click the **Select** button (J2).



The screenshot shows the 'Custom Jobs Database' form with the following updates and annotations:

- J1**: A new 'Catalogue' dropdown menu has appeared below the 'Type' dropdown.
- J2**: A 'Select' button has appeared next to the 'Catalogue' dropdown.

The form now includes the 'Catalogue' dropdown and the 'Select' button. The 'Type' dropdown remains set to 'PG - Product'.

- K. A new product group line will be added to the table, this represents a part selected from the catalogue, which can have a variable price based on the particular vehicle. Add a labour line by selecting **L - Labour** from the **Type** dropdown menu (K1), then enter the relevant **Labour Code** (K2). This process can be repeated to add individual parts and Work Descriptions if required. When you are happy with your job, click the **Update** button (K3).

Custom Jobs Database

Job Name [Find](#)
BRKFIT

Description
Brake pad fitting

Nominal Code
4000 - Default Sales

Update

Cancel

Price Type

Complete

K1

Category

Brakes

K2

VAT Code

1 - Standard

Cost

Sell

150

Labour Rate

Use Customer Rate

Active

☒

Type

PG - Product Group

Code

Description

Qty

Sell

Search

Add

Clear

Catalogue

Pads

Select

Type	Code	Description	Catalogue	Qty	Sell	Total	Delete	Edit
PG		Pads		1	0.00	0.00		

K3

A. On the **Document** tab, with a customer and vehicle entered, click the **Add Job** button.

B. Click the **Jobs** option.

Customer: TUR013 - Mr Robert Turner

Phone: [Enter Mobile No.](#)

Email: [Enter Email](#)

Fleet: [None](#)

Warranty: [None](#)

Vehicle: YS12DJF Ford Fiesta

On Site: ☐

Due In: [Click to Enter](#)

Loan Car: [Not Required](#)

Valet: [Not Required](#)

Work Description

Mileage: [Confirm](#)

Option	Sell	Qty	Disc	VAT	Total
Consumables	0.00		0.0%	0.0%	0.00
			Goods	VAT	Total
			0.00	0.00	0.00

Assign Job

Invoice

Credit

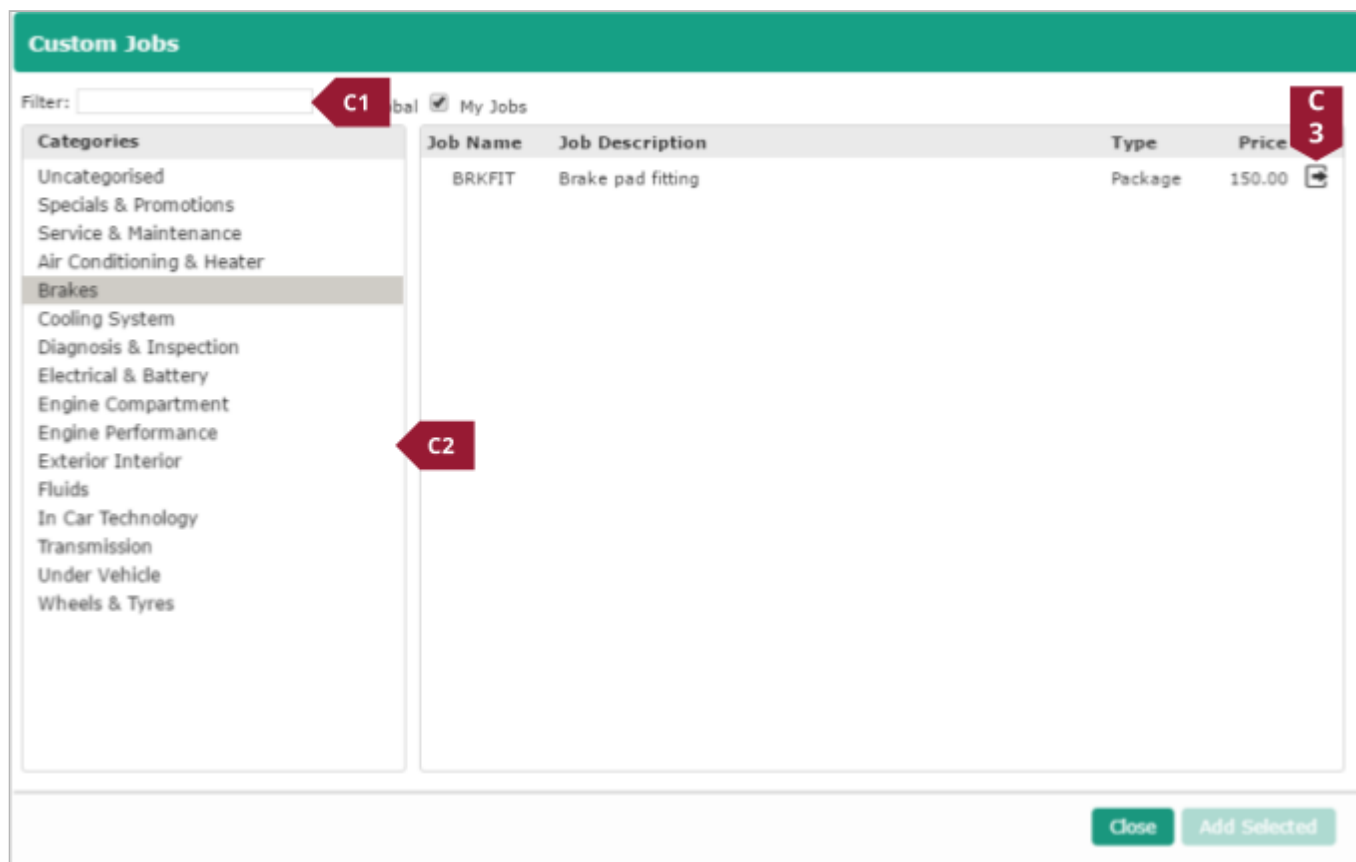
Print

Discounts

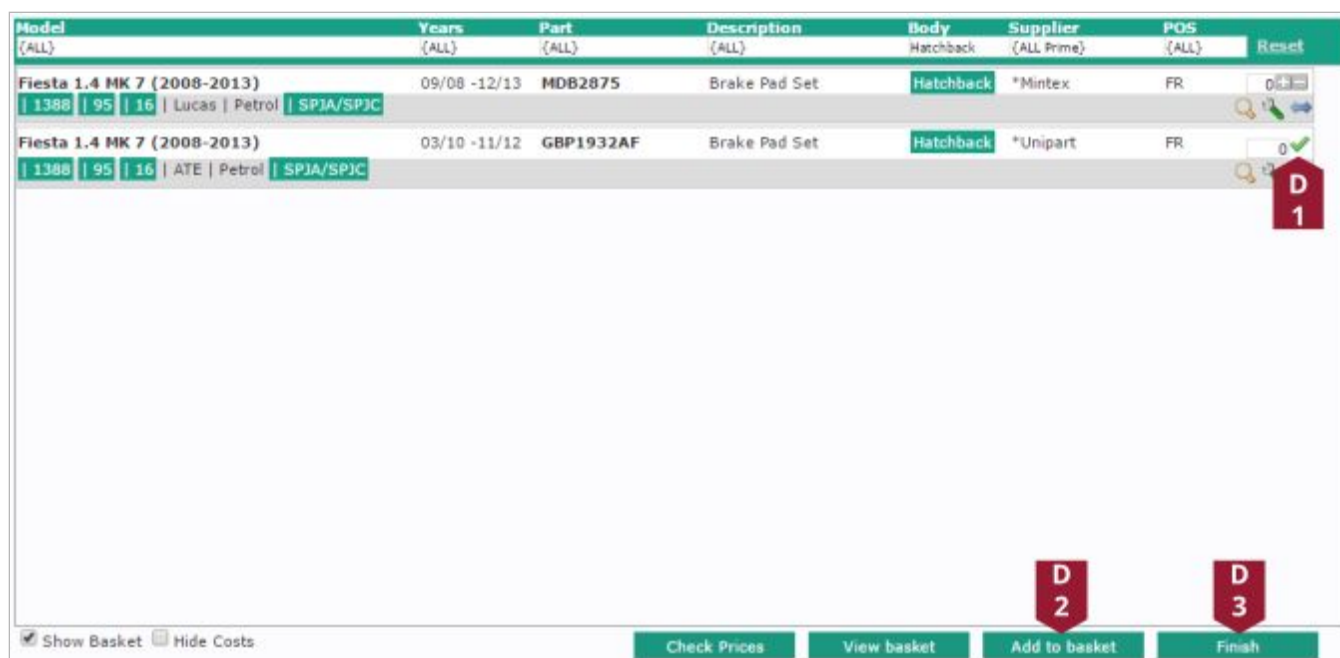
Order / Receive

Split

- C. In the **Custom Jobs** screen, select the appropriate **Category** (C1), or enter a **Filter** query (C2), then click the **Add** button (C3) against the appropriate job.



- D. The Catalogue will automatically open with the correct registration and product group pre-entered. Click the **Add** button (D1) for the required part(s), then click the **Add to basket** button (D2), followed by the **Finish** button (D3).



- E. Line level prices will be shown in the grid (E1), but the total for the job (E2) will equal the amount set in the Complete Price job regardless of these.

Code	Description	E1	Qty	Disc	VAT	Total		
	<u>Brake pad fitting</u>				E2	180.00	C	+ X
<u>lab2</u>	Labour	70.00	1.00	0.0%	20.0%	84.00		X
<u>LVXL1370</u>	Brake Pad Set	22.99	1.00	0.0%	20.0%	27.59		X
	<u>Consumables</u>	0.00		0.0%	0.0%	0.00		
					Goods	VAT	Total	
					150.00	30.00	180.00	
Check Margins								
Estimate	Job	Assign Job	Invoice	Credit	Print	Discounts	Order / Receive	Split

- F. The line level values will not be shown on the customer's invoice, only the sub-total for the job.

Mr Robert Turner
Maple Park, Maple Court, Tanke
Barnsley
Barnsley
South Yorkshire
S75 3DP

Invoice

Invoice No. 1000005
Account Ref. TUR001
Date. 22/03/2017

Technician. A Technician

Brake pad fitting	Qty	Unit	VAT%	Net Total
Labour			20.0	
LVXL1370 Brake Pad Set	1.00		20.0	
Sub Total				150.00

Automated SMS

The new Automated SMS feature allows for up to three pre-defined SMS text messages to be sent for each reminder. Supported events are:

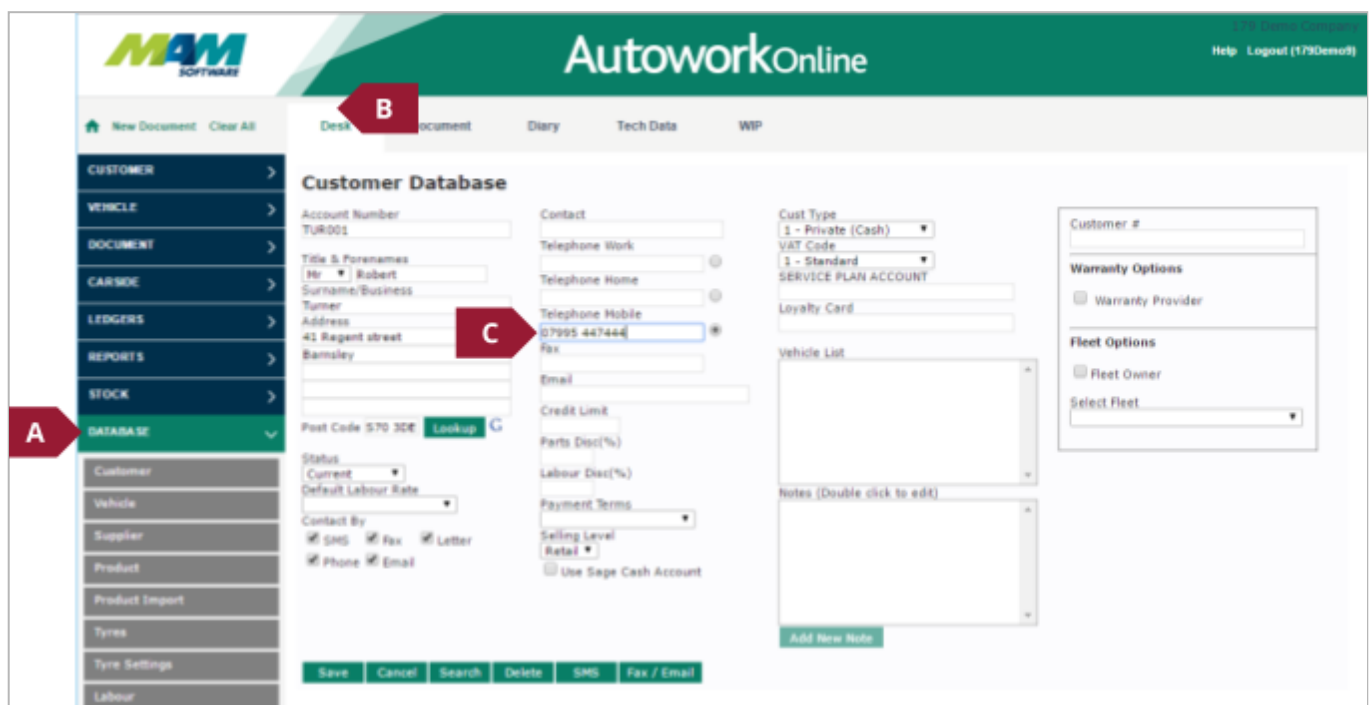
- Appointments
- Reminders (e.g. MOT due date)
- Deferred Work

SMS reminders can help to boost profit margins by increasing repeat business and reducing time, and money lost due to "no shows".

Configuring reminders

Please note: Before reminders can be used, the customer must have a valid **mobile phone number** (C) set against them in the **Customer** (B) section of the **Database** (A) menu. If the number is changed between the reminder being set, and the reminder sending, the current number at the time of sending will be used automatically.

Mobile numbers can also be added to existing customers on the fly from the Document tab by clicking the **Mobile Number** link in the screen header.

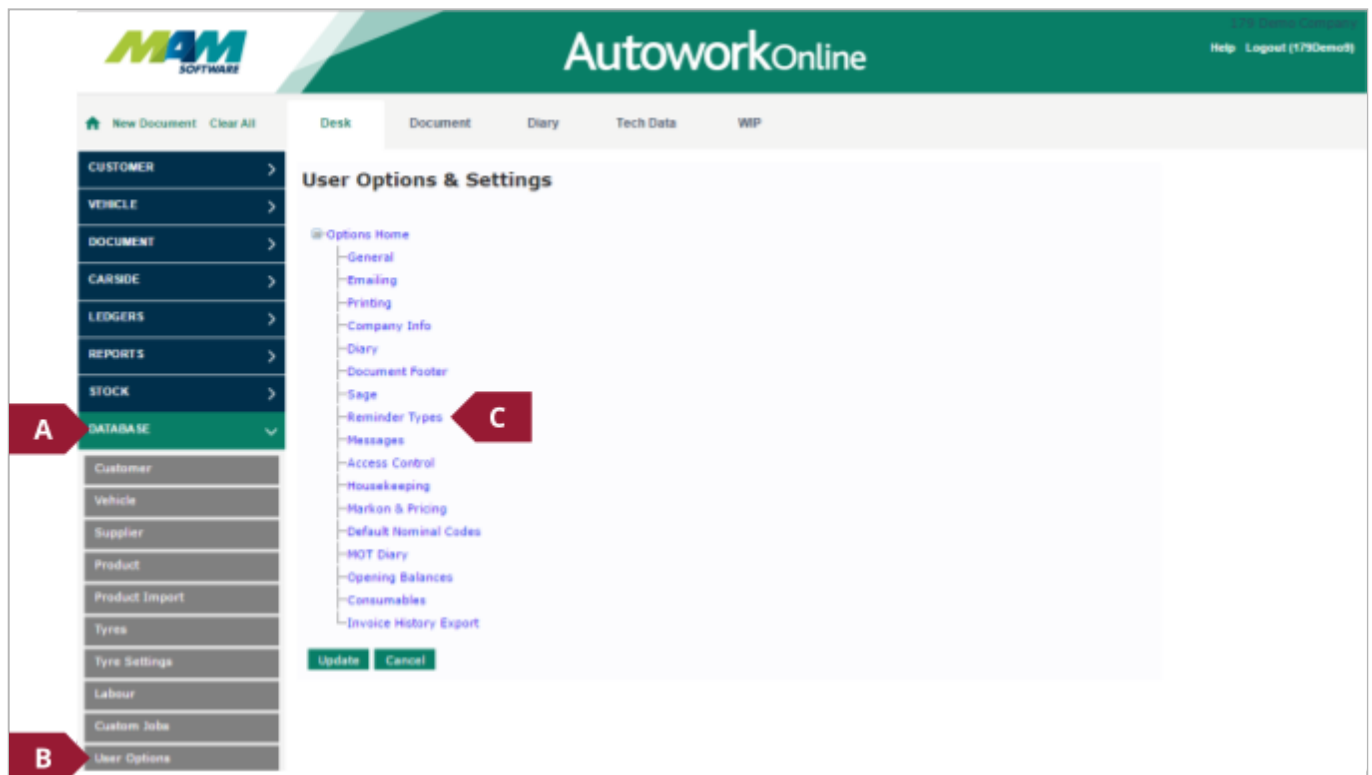


The sending times of the automated messages will automatically change if the date of the reminder is changed, and any automated messages will be cancelled if the reminder is cancelled.

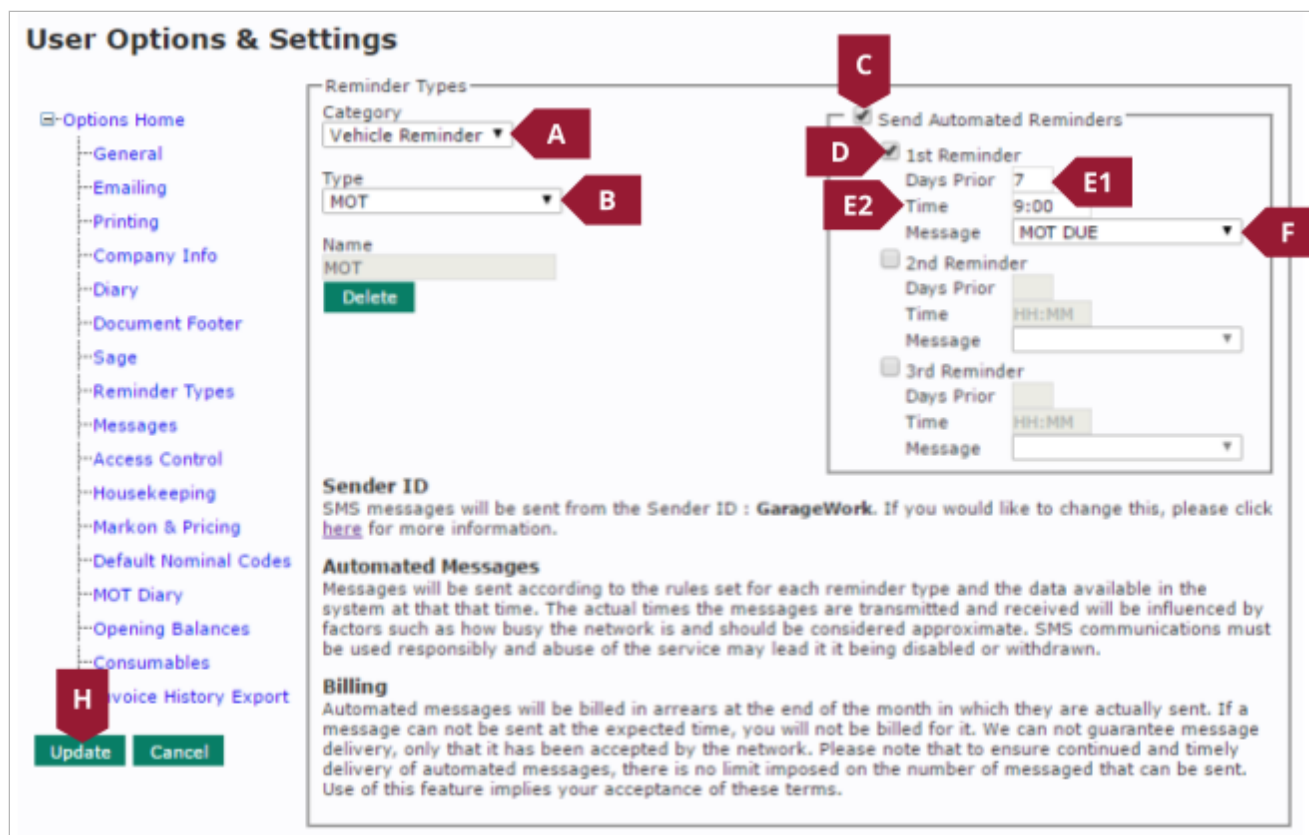
Setting up new reminders

The **Reminder Types** screen allows up to three separate reminder text messages to be sent for each specific reminder type. The messages used are the same ones used for manually sent reminders, these can be configured by clicking the **Messages** link in the **User Options** menu (see previous screenshot).

- A. Click the **Database** menu item.
- B. Select the **User Options** menu item.
- C. Click the **Reminder Types** link.



- A. Select a **Reminder Category** from the dropdown menu.
- B. Select a **Reminder Type** from the dropdown menu, or select the **Create New** option and enter a name.
- C. Check the **Send Automated Reminders** checkbox.
- D. Check the **1st Reminder** checkbox.
- E. Enter a number of **Days Prior** (E1) to the reminder date to send the message (this can be set to **0** to send the message on the day of the reminders), and set a **Time** (E2) for the message to be sent (**note**: This should be treated as an approximation, as many factors can affect the sending time).
- F. Select the **Message** template to use from the dropdown menu.
- G. *Optionally, repeat steps D - F for the **2nd** and **3rd** Reminder.*
- H. Click the **Update** button to confirm the changes.



User Options & Settings

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- Sage
- Reminder Types
- Messages
- Access Control
- Housekeeping
- Markon & Pricing
- Default Nominal Codes
- MOT Diary
- Opening Balances
- Consumables
- Invoice History Export

Reminder Types

Category: Vehicle Reminder **A**

Type: MOT **B**

Name: MOT

Delete

Send Automated Reminders **C**

☒ Send Automated Reminders

1st Reminder **D**

Days Prior: 7 **E1**

Time: 9:00 **E2**

Message: MOT DUE **F**

2nd Reminder

Days Prior:

Time: HH:MM

Message:

3rd Reminder

Days Prior:

Time: HH:MM

Message:

Sender ID

SMS messages will be sent from the Sender ID : **GarageWork**. If you would like to change this, please click [here](#) for more information.

Automated Messages

Messages will be sent according to the rules set for each reminder type and the data available in the system at that time. The actual times the messages are transmitted and received will be influenced by factors such as how busy the network is and should be considered approximate. SMS communications must be used responsibly and abuse of the service may lead it being disabled or withdrawn.

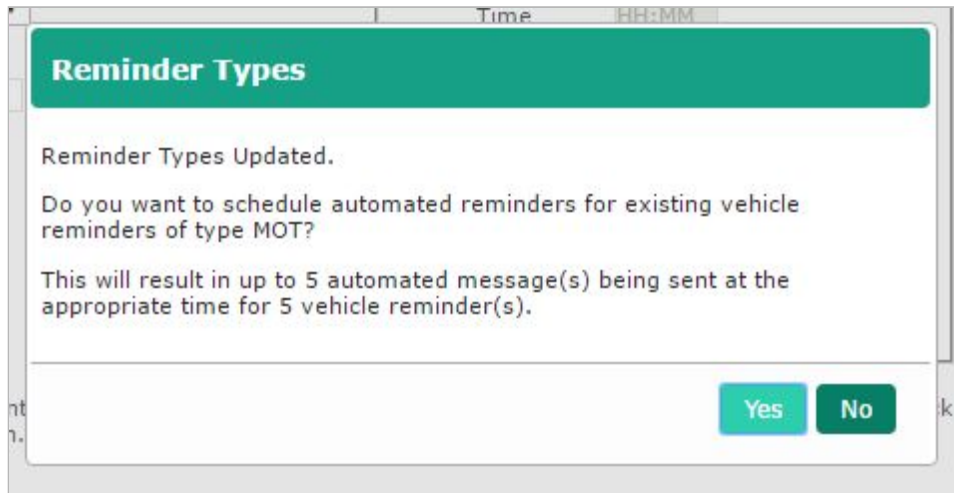
Billing

Automated messages will be billed in arrears at the end of the month in which they are actually sent. If a message can not be sent at the expected time, you will not be billed for it. We can not guarantee message delivery, only that it has been accepted by the network. Please note that to ensure continued and timely delivery of automated messages, there is no limit imposed on the number of messages that can be sent. Use of this feature implies your acceptance of these terms.

H

Update Cancel

When you click update, the following message may display:



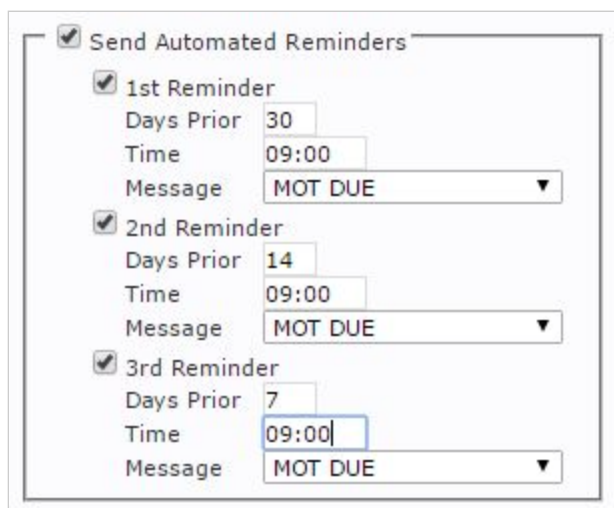
Clicking the **Yes** button will apply your settings for all future events. If the **No** button is clicked, the settings will only be applied to newly created or updated events. In neither case will reminders be sent for events in the past.

Example configurations

The following examples show some of the the different ways that reminders can be configured to get the most out of the feature.

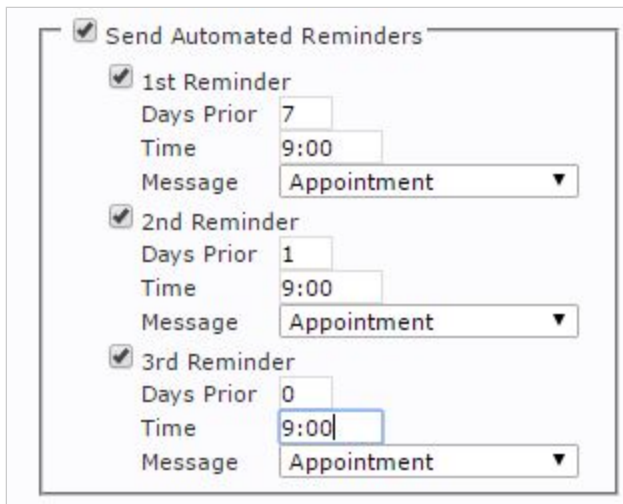
scheduled MOT reminders

The following settings would result in three messages being sent for each reminder, these would be at 30, 14, and seven days before the reminder date:



Appointment reminders

The following settings can be used to send the customer three separate reminders of their booked MOT appointment. These would be a week and a day before, and on the morning of the booking. The date this is based on is the **Due In** date. This can be set by clicking the link in the header of the Document tab, this will automatically be set to the appointment date, but can be modified independently if required:



☒ Send Automated Reminders

☒ 1st Reminder

Days Prior

Time

Message

☒ 2nd Reminder

Days Prior

Time

Message

☒ 3rd Reminder

Days Prior

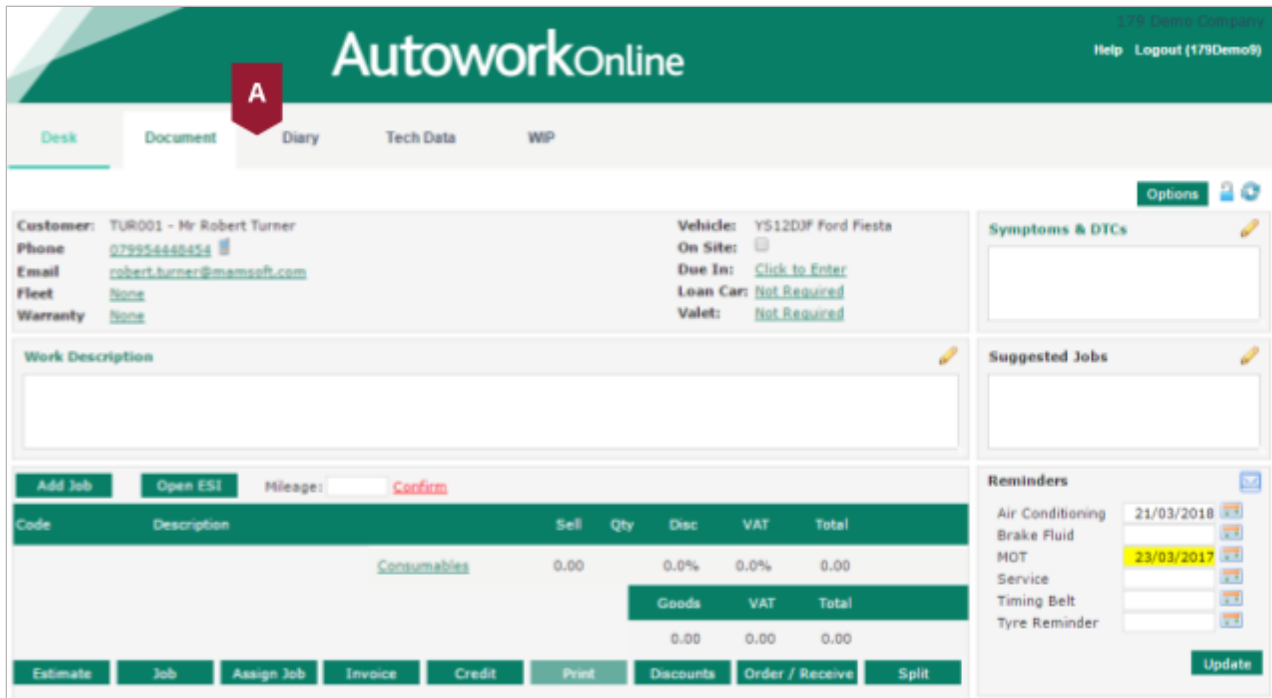
Time

Message

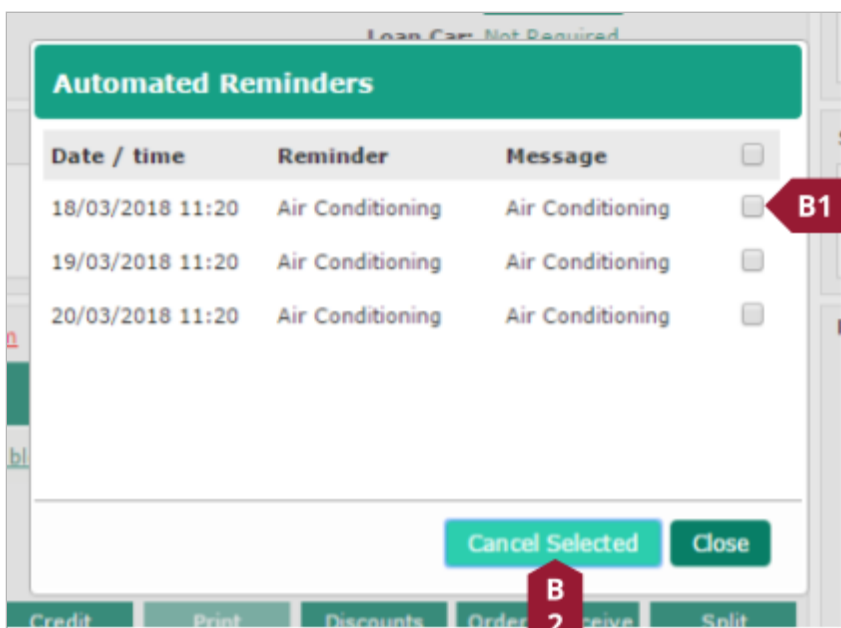
Viewing and cancelling existing reminders

It is also possible to view any pending automated messages via the Document screen, and any unnecessary messages can be cancelled from here.

- A. When a customer and vehicle have been entered, a small letter icon will appear in the **Reminders** section of the screen if there are any automated reminders scheduled for the customer. This will display in red if there are reminders that will be sent in the next 30 days.



- B. Check the boxes (B1) against any reminders you would like to cancel, then click the **Cancel Selected** button (B2).



Improved CRM screen

The Customer Relationship Management (CRM) section of the reporting system has been improved to allow better visibility of previously sent and pending messages, both those sent automatically, and ones sent manually via the CRM screen.

Viewing actioned reminders

It is possible to view where messages related to a particular reminder have been sent, this is indicated by a green tick in the relevant column of the table in the Reminders section of the CRM feature. There are four columns are used to indicate which contact method was used.

Customer Relationship Manager

Type

Reminders

Reminders

Reminder Type

Air Conditioning

Date From

Date To

Display

Cancel

☐ Exclude on stop customers

Action

Contact Method

SMS

Message

Available Credit

98

Approx Cost

1.0

Print All

Send

Customer	Vehicle	Mobile	Due			
DAN001	Mr Daniel	YS13FBZ	Fiat Fiorino	07770875767	19/03/2017	✓
TUR001	Mr Turner	YS12DJF	Ford Fiesta	079954448454	21/03/2018	✓

Viewing sent messages

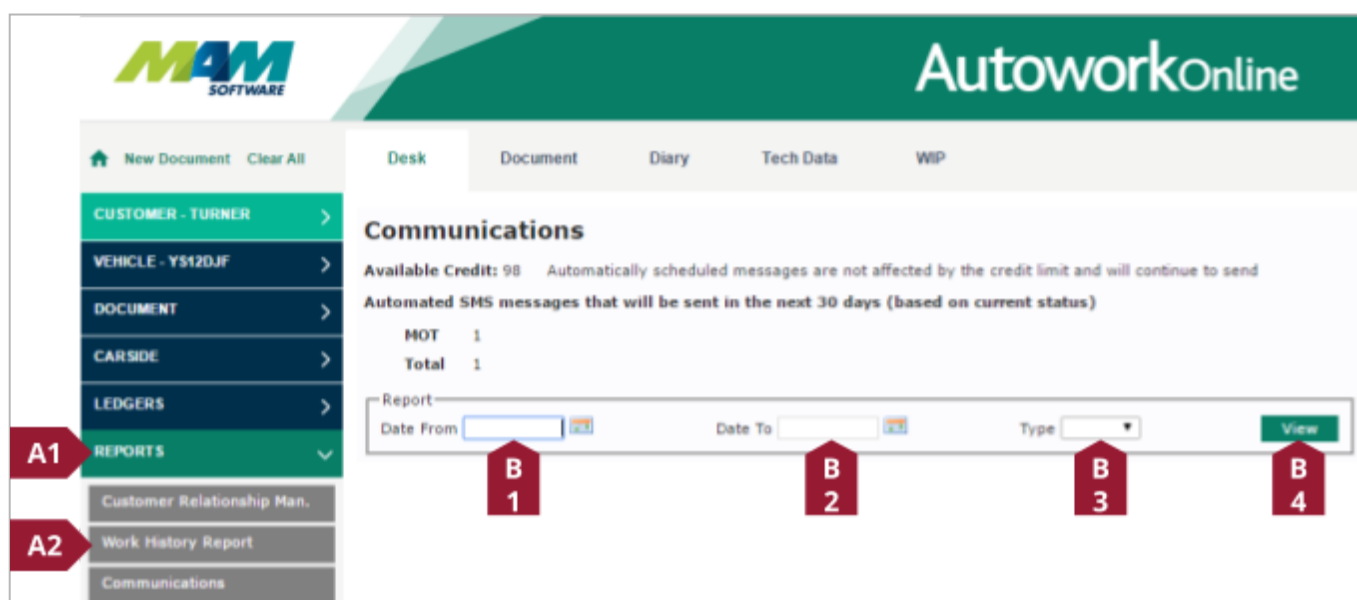
It is also possible to view the individual messages sent for each reminder. To do this, click the green tick (see screenshot above). This will open a window showing the sent messages' date, recipient, type, and message.

Communication History				
Sent	Recipient	Type	Username	Message
18/03/2017 11:33	447770875767	SMS	AUTO	Air Conditioning
Mr Daniel just a reminder that your air conditioning system is due for service on YS13FBZ Fiorino please contact our reception on 01952 585511 £5 off				
17/03/2017 11:47	447770875767	SMS	AUTO	Air Conditioning
Mr Daniel just a reminder that your air conditioning system is due for service on YS13FBZ Fiorino please contact our reception on 01952 585511 £5 off				
Close				

Viewing the Communications Audit Report

A new Communications Audit report has been added to allow users to view a complete list of all sent messages at a glance. The new report is accessed using the following process:

- A. From the **Reports** menu (A1), select the **Communications** option (A2).
- B. Enter a **Date From**, (B1) **Date To** (B2) (these can be left blank to show all results), and select a **Type** (B3) to filter the report, click the **View** button (B4) when you are happy with your selections.



Available Credit: 98 Automatically scheduled messages are not affected by the credit limit and will continue to send

Automated SMS messages that will be sent in the next 30 days (based on current status)

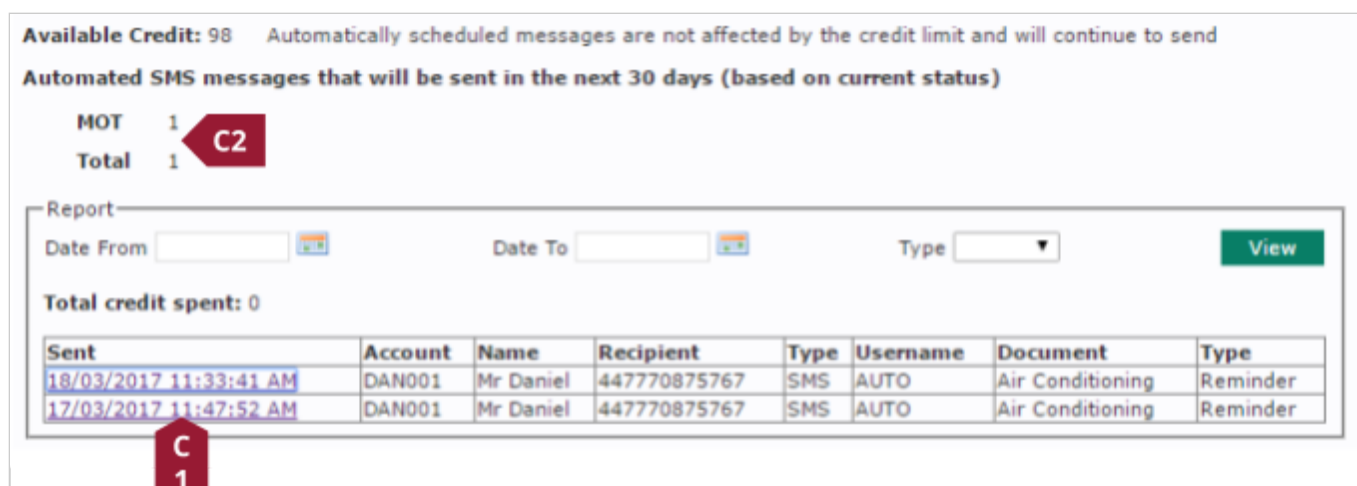
MOT 1
Total 1

Report
Date From Date To Type

A1: REPORTS
A2: Communications

B1: Date From
B2: Date To
B3: Type
B4: View

- C. The report will list information on all messages sent which match the filters set in step B. Clicking the message sent date (C1) will display the full message text. Also displayed are projected figures for messages that will be sent in the next 30 days (C2).



Available Credit: 98 Automatically scheduled messages are not affected by the credit limit and will continue to send

Automated SMS messages that will be sent in the next 30 days (based on current status)

MOT 1
Total 1

Report
Date From Date To Type

Total credit spent: 0

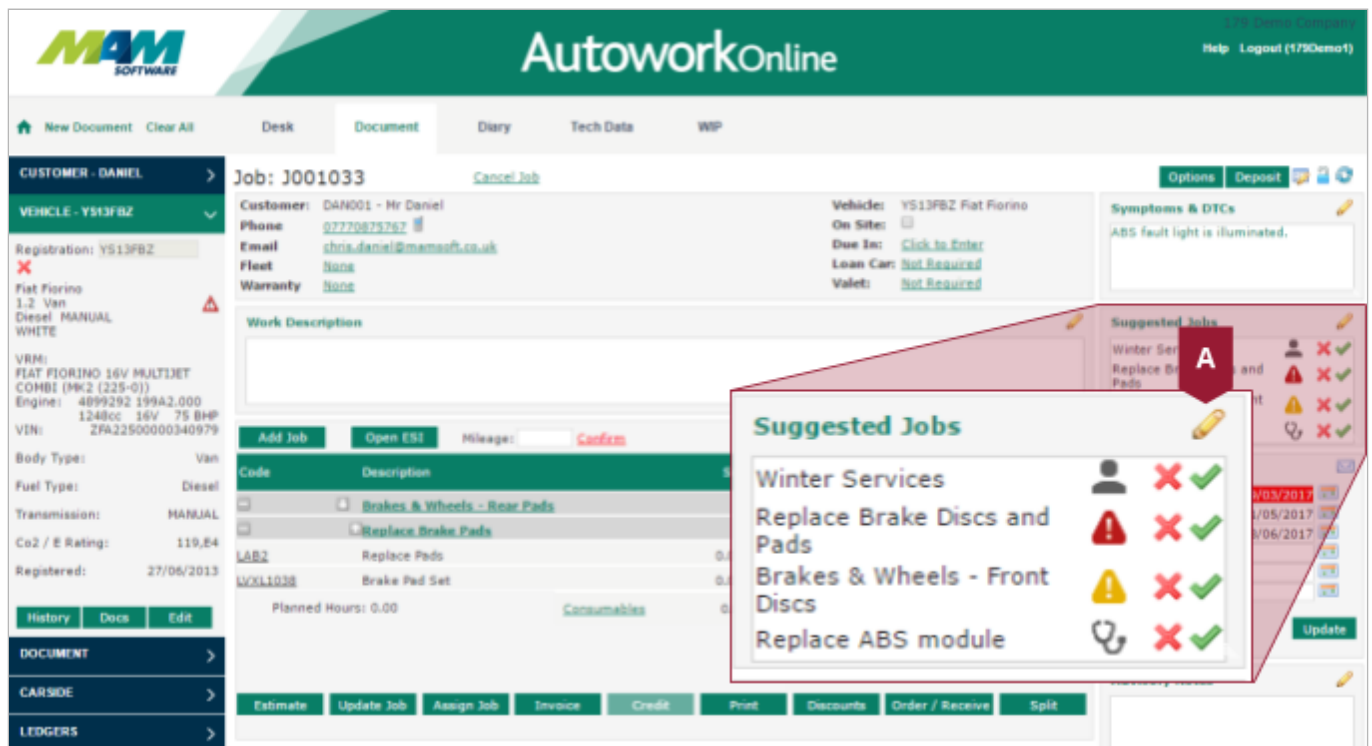
Sent	Account	Name	Recipient	Type	Username	Document	Type
18/03/2017 11:33:41 AM	DAN001	Mr Daniel	447770875767	SMS	AUTO	Air Conditioning	Reminder
17/03/2017 11:47:52 AM	DAN001	Mr Daniel	447770875767	SMS	AUTO	Air Conditioning	Reminder

C1: 18/03/2017 11:33:41 AM
C2: 17/03/2017 11:47:52 AM

Manually adding Suggested Jobs

In some cases, it may be desirable to manually add a Suggested Job to the Job in progress. For example, a more senior technician could add their suggestions. Once added, the manual suggestions can be added to the Job in the same way that other Suggested Jobs are, see the [Adding Suggested jobs to a Job in progress](#) section of this guide for more information on this. Suggested Jobs can be manually added using the following process:

- A. From the Document tab, click the **Pen (edit)** button on the Suggested Jobs section.



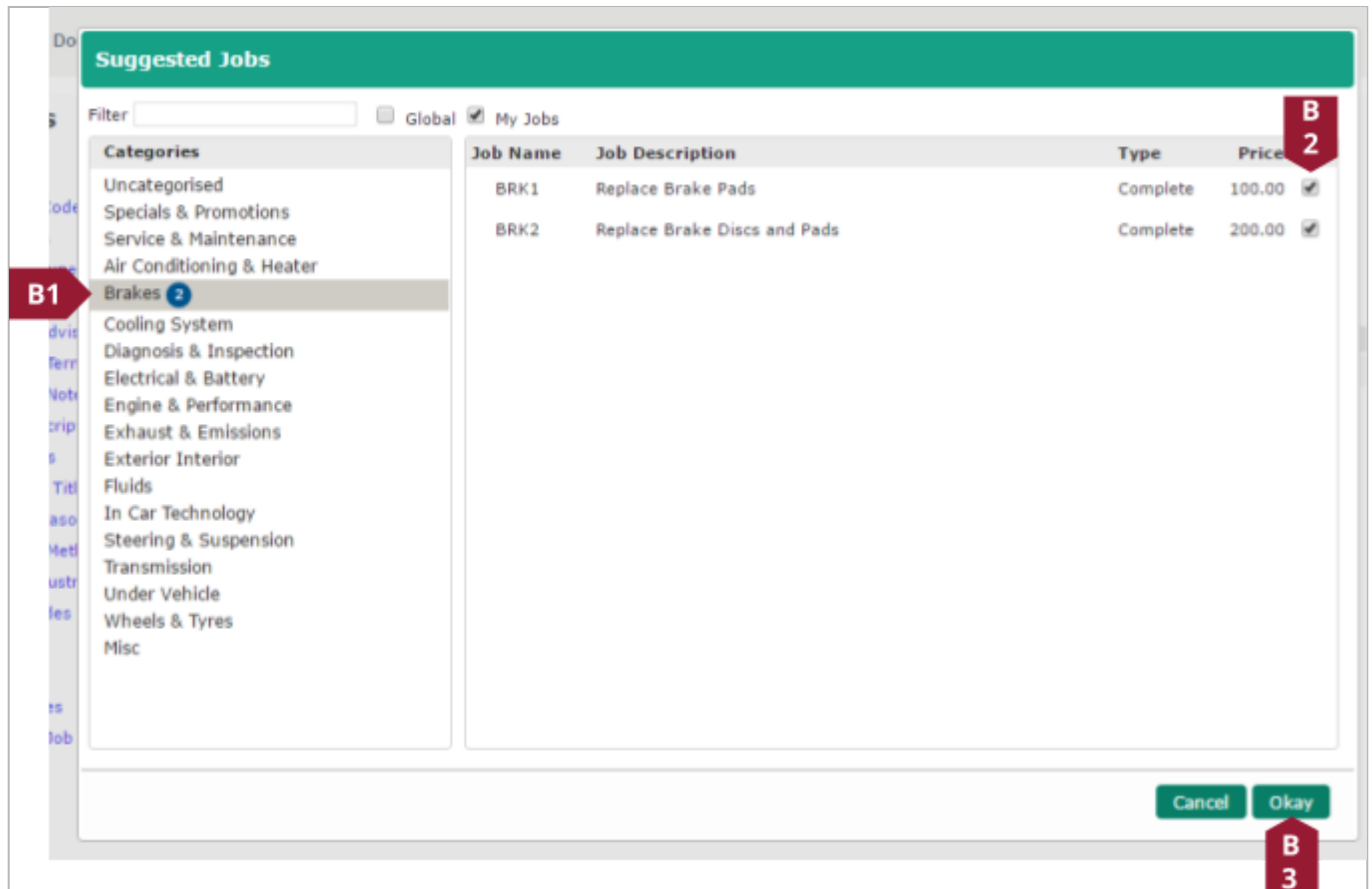
The screenshot shows the AutoworkOnline interface. The top navigation bar includes 'New Document', 'Clear All', 'Desk', 'Document', 'Diary', 'Tech Data', and 'WIP'. The left sidebar shows 'CUSTOMER - DANIEL' and 'VEHICLE - YS13FBZ'. The main area displays job details for Job: J001033, including customer information, vehicle details, and a list of suggested jobs. A red callout box labeled 'A' points to the 'Pen (edit)' button in the 'Suggested Jobs' section.

Code	Description	Planned Hours
LAB2	Replace Pads	0.0
UVXL1038	Brake Pad Set	0.0

The 'Suggested Jobs' section lists the following items:

- Winter Services
- Replace Brake Discs and Pads
- Brakes & Wheels - Front Discs
- Replace ABS module

- B. Select a **Category** (B1), and then check the boxes (B2) against any jobs you would like to include. Click the **Okay** button (B3) when you are happy with the selections. This will add the Suggested Jobs, which can then be added to the Job using the process in the [Adding Suggested Jobs to a Job in progress](#) section of this document.



Suggested Jobs

Filter ☐ Global ☒ My Jobs

Categories

- Uncategorised
- Specials & Promotions
- Service & Maintenance
- Air Conditioning & Heater
- Brakes 2**
- Cooling System
- Diagnosis & Inspection
- Electrical & Battery
- Engine & Performance
- Exhaust & Emissions
- Exterior Interior
- Fluids
- In Car Technology
- Steering & Suspension
- Transmission
- Under Vehicle
- Wheels & Tyres
- Misc

Job Name	Job Description	Type	Price
BRK1	Replace Brake Pads	Complete	100.00 2
BRK2	Replace Brake Discs and Pads	Complete	200.00 2

Cancel Okay

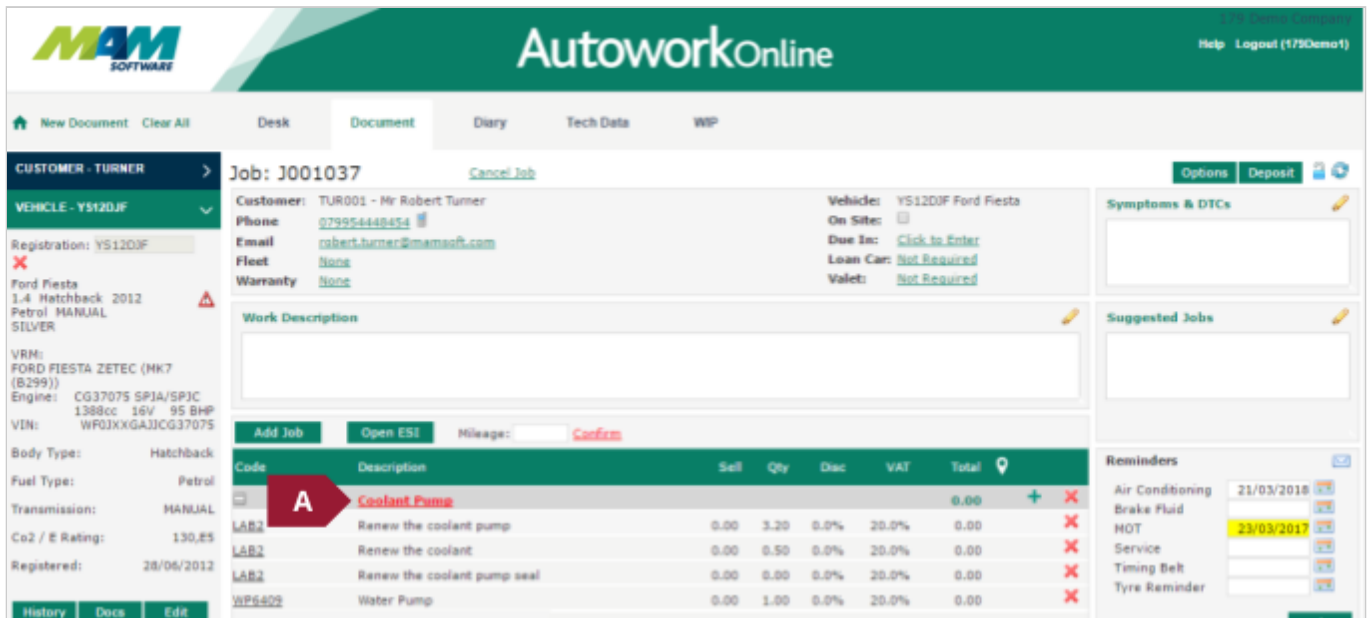
Job Group categorisation

A new feature allows for job groups to be categorised when they are added to a Job. The list of categories used is the same as those used in the Custom Jobs screen, and any job added from a Custom Job will automatically be set to the correct category.

Setting Job Group Categories

Job Group Categories can be set directly from the Document screen when building a job by using the following process:

- A. Click the **Description** of the Job Group you would like to categorise.



Job: J001037

Customer: TUR001 - Mr Robert Turner
 Phone: 07995448454
 Email: robert.turner@mamsoft.com
 Fleet: None
 Warranty: None

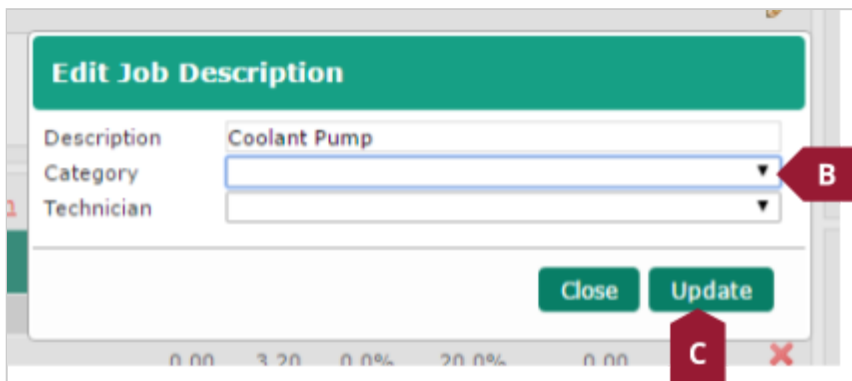
Vehicle: YS120JF Ford Fiesta
 On Site: ☐
 Due In: [Click to Enter](#)
 Loan Car: [Not Required](#)
 Valet: [Not Required](#)

Work Description

Code	Description	Sell	Qty	Disc	VAI	Total	
LAB2	Coolant Pump	0.00	3.20	0.0%	20.0%	0.00	
LAB2	Renew the coolant pump	0.00	0.50	0.0%	20.0%	0.00	
LAB2	Renew the coolant pump seal	0.00	0.00	0.0%	20.0%	0.00	
WPS402	Water Pump	0.00	1.00	0.0%	20.0%	0.00	

Reminders: Air Conditioning 21/03/2018, Brake Fluid 21/03/2017, MOT, Service, Timing Belt, Tyre Reminder

- B. Select the required **Category**.
- C. Click the **Update** button when you are happy with your settings.



Edit Job Description

Description: Coolant Pump

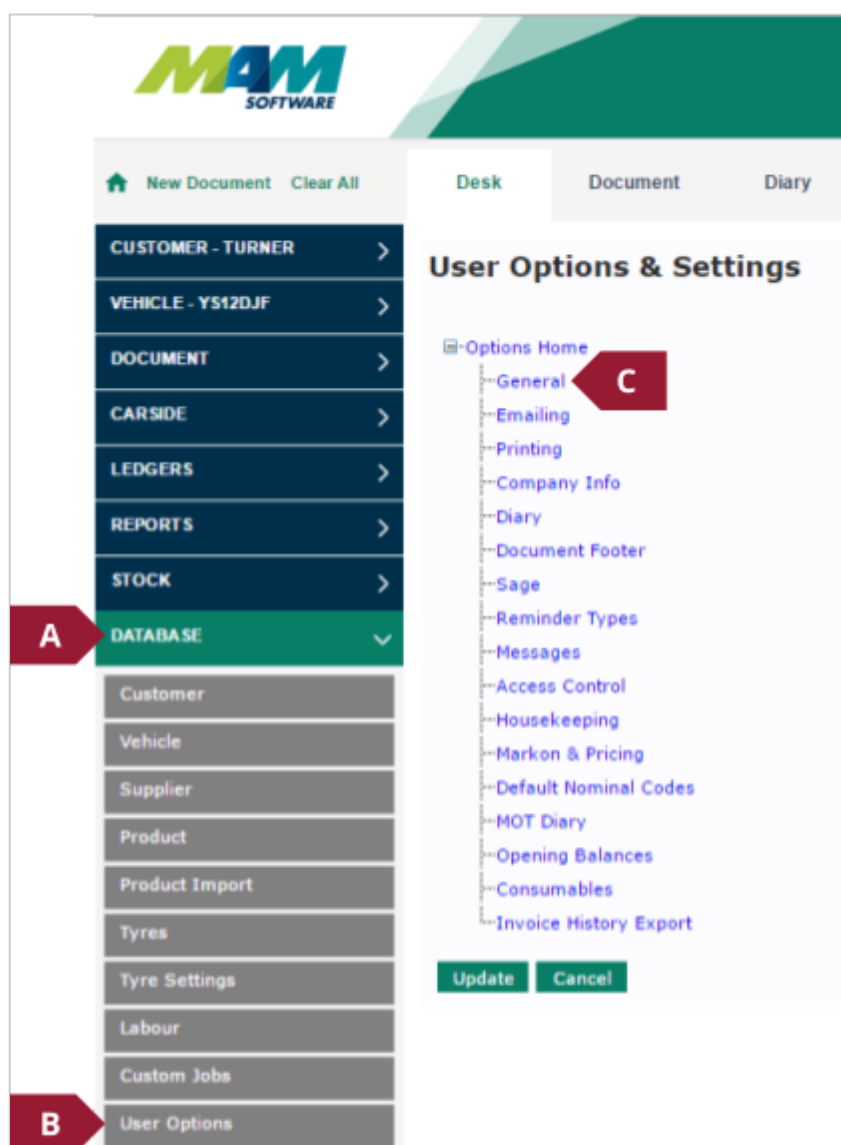
Category: ▼

Technician: ▼

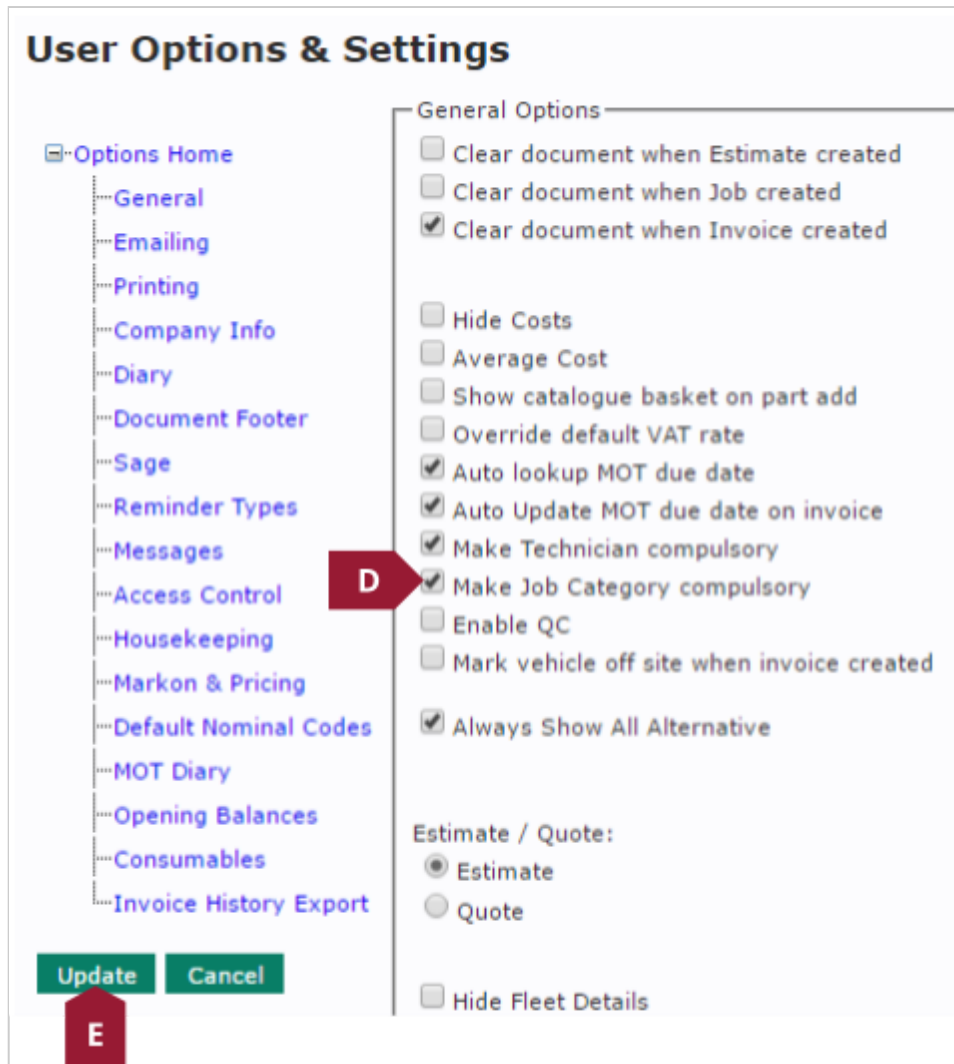
Making the Category field mandatory

It is also possible to make completion of the Category field mandatory by using the following process:

- A. Click the **Database** menu.
- B. Select the **User Options** sub-menu.
- C. Click the **General** link.



- D. Check the **Make Job Category Compulsory** checkbox.
- E. Click the **Update** button to confirm the settings.



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- Markon & Pricing
- Default Nominal Codes
- MOT Diary
- Opening Balances
- Consumables
- Invoice History Export

General Options

- ☐ Clear document when Estimate created
- ☐ Clear document when Job created
- ☒ Clear document when Invoice created
- ☐ Hide Costs
- ☐ Average Cost
- ☐ Show catalogue basket on part add
- ☐ Override default VAT rate
- ☒ Auto lookup MOT due date
- ☒ Auto Update MOT due date on invoice
- ☒ Make Technician compulsory
- ☒ **Make Job Category compulsory**
- ☐ Enable QC
- ☐ Mark vehicle off site when invoice created
- ☒ Always Show All Alternative

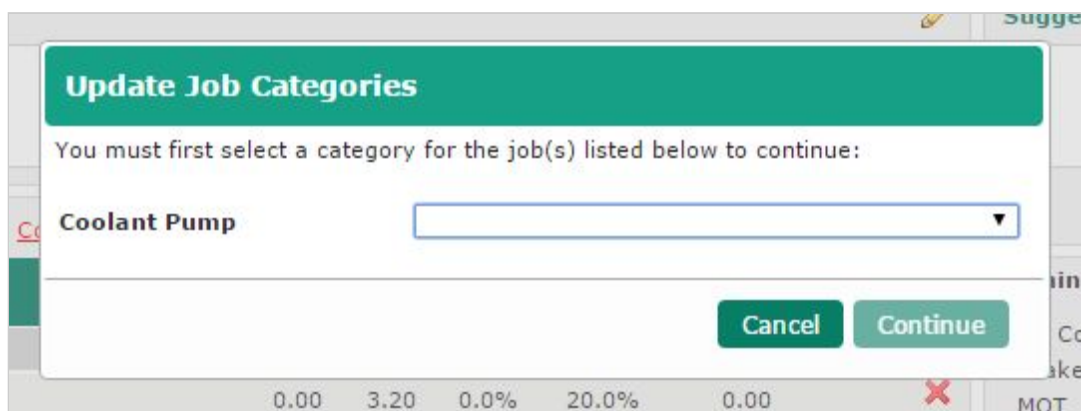
Estimate / Quote:

- ☒ Estimate
- ☐ Quote

☐ Hide Fleet Details

Update **Cancel**

When a user attempts to invoice a job which contains uncategorised jobs, the following prompt will pop up asking them to update the missing fields.



Update Job Categories

You must first select a category for the job(s) listed below to continue:

Coolant Pump

Cancel **Continue**

0.00 3.20 0.0% 20.0% 0.00 X MOT

Schedule of Work printing

A new Schedule of Work document option has been added specifically for fleet or warranty work. This provides a record of the work carried out, but without any pricing information.

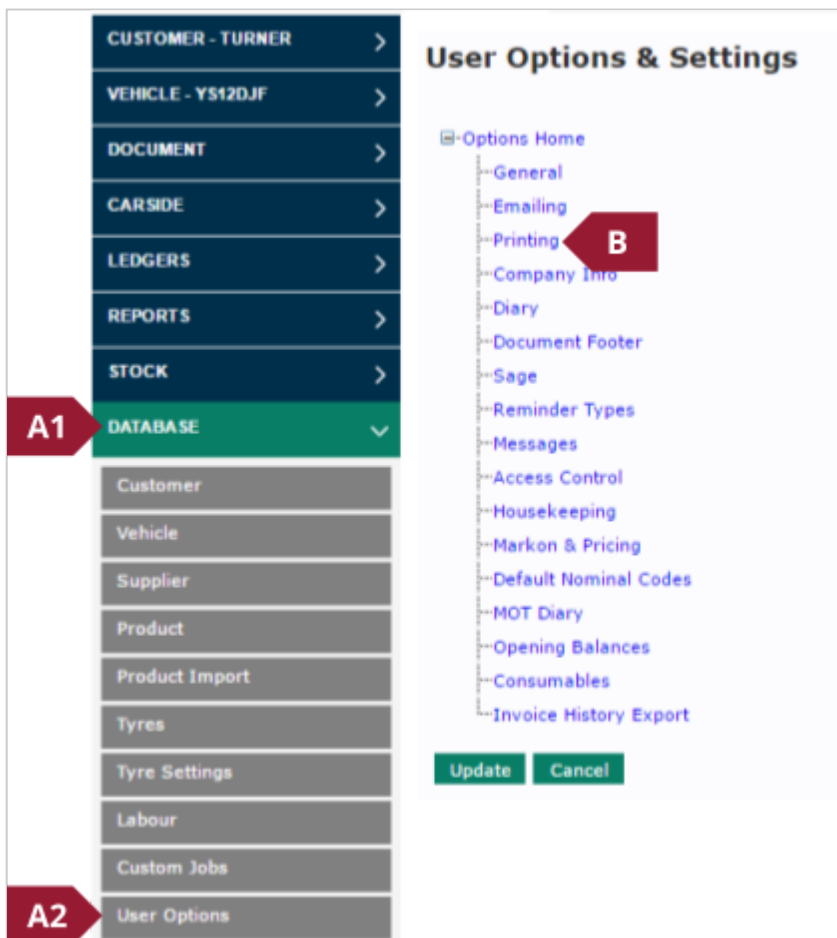
The Schedule of Work can be printed manually from the Document screen, or set to automatically print for split invoices.

Additionally, message text can be set to display at the top of the document (for example "This is not an invoice - for reference only").

Setup

Before use, it is advisable to configure a document message for the Schedule of Work document, and also set the document to automatically print for split invoices if required. To do this, use the following process:

- A. From the **Database** menu (A1), select the **User Options** option (A2).
- B. Click the **Printing** link.



- C. Scroll down the page, type the text to show in the document header into the **Text to include on Schedule of Work** box.
- D. Optional: check the **Include Schedule of Work when printing split invoices** checkbox if you would like to enable this option.

Margins

	Header	Footer	
Invoice / Credit	10	10	mm
Estimate	20	20	mm
Job Card	30	30	mm
Everything Else	40	40	mm

Automatically popup print preview

☐ Estimate
 ☐ Job
 ☐ Invoice / Credit

Consolidate lines on document

☒ Show All Lines
☐ Minimise Labour Lines Labour Carried out
☐ Minimise Parts Lines Parts Used
☐ Minimise All Lines Parts Used and Labor Carried Out
☐ Hide Part Numbers

Invoice Reprint

☐ Prompt to use current customer address when printing

Include Schedule of Work

☒ Include Schedule of Work when printing split invoices


Text to include on Schedule of Work (up to 230 characters)

This is not an invoice - for reference only

Manually printing a Schedule of Work

If the option is enabled, the Schedule of Work will automatically print when a split invoice is generated, but it may also be printed manually from the Document tab.

- A. Click the **Options** button.



AutoworkOnline

Help Logout (179Demo1)

New Document Clear All Desk Document Diary Tech Data WIP

CUSTOMER - TURNER

VEHICLE - YS12DJF

Registration: YS12DJF

Ford Fiesta

Job: J001038 [Cancel Job](#)

Customer: TUR001 - Mr Robert Turner

Phone: 07995448454

Email: robert.turner@mamsoft.com

Fleet: None

Warranty: None

Vehicle: YS12DJF Ford Fiesta

On Site: ☐

Due In: [Click to Enter](#)

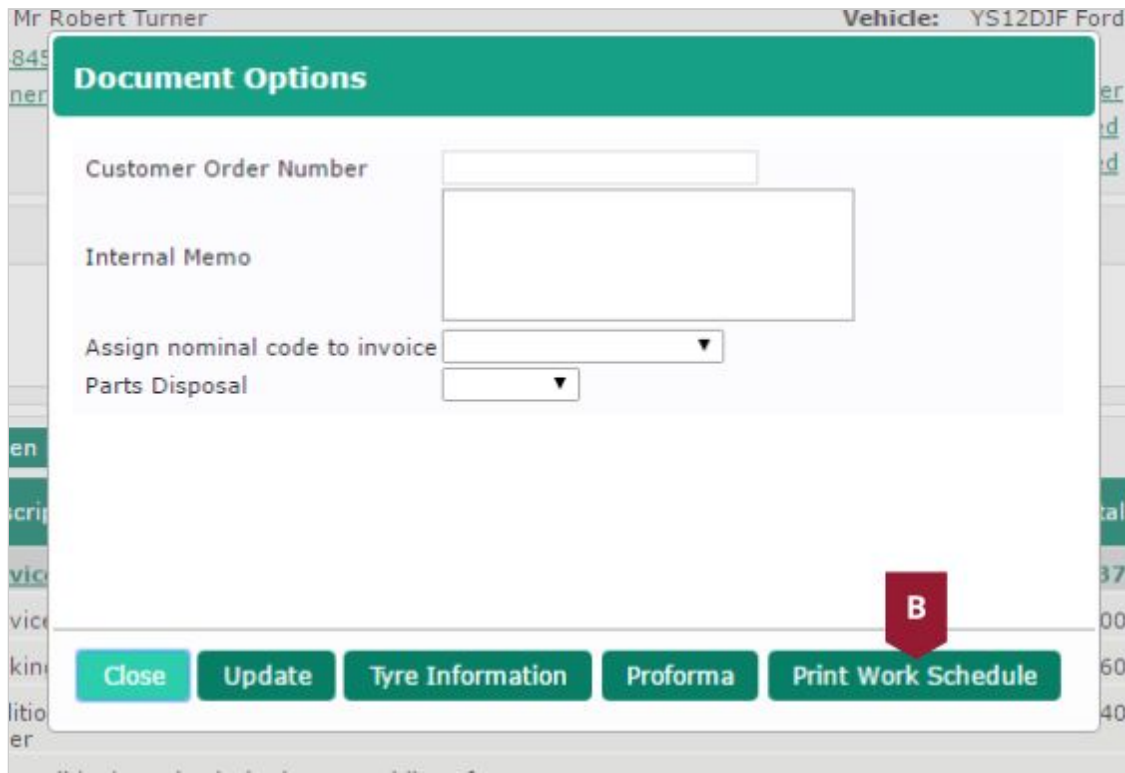
Loan Car: [Not Required](#)

Valet: [Not Required](#)

Options **Deposit**

Symptoms & DTCs

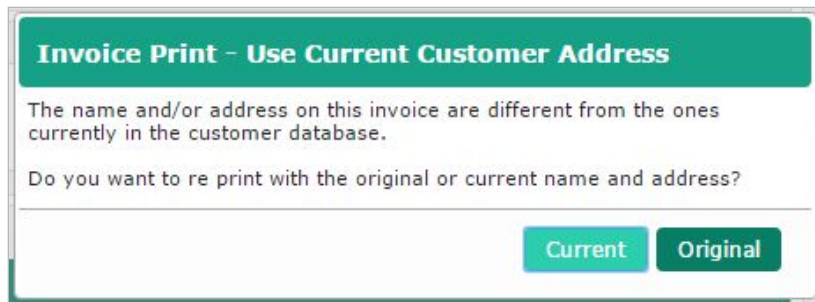
B. Click the **Print Work Schedule** button.

A screenshot of a software window titled 'Document Options'. The window has a green header bar with the title. Below the header, there are four input fields: 'Customer Order Number' (a single-line text box), 'Internal Memo' (a multi-line text area), 'Assign nominal code to invoice' (a dropdown menu), and 'Parts Disposal' (a dropdown menu). At the bottom of the window, there is a row of five buttons: 'Close', 'Update', 'Tyre Information', 'Proforma', and 'Print Work Schedule'. A red arrow with the letter 'B' points to the 'Print Work Schedule' button. The background of the window shows a blurred view of a vehicle information screen with fields like 'Mr Robert Turner' and 'Vehicle: YS12DJF Ford'.

Minor changes

Customer name / address check on reprint

An additional option can be set which will present the user with a prompt when reprinting a document where the customer's address has changed since it was first raised:

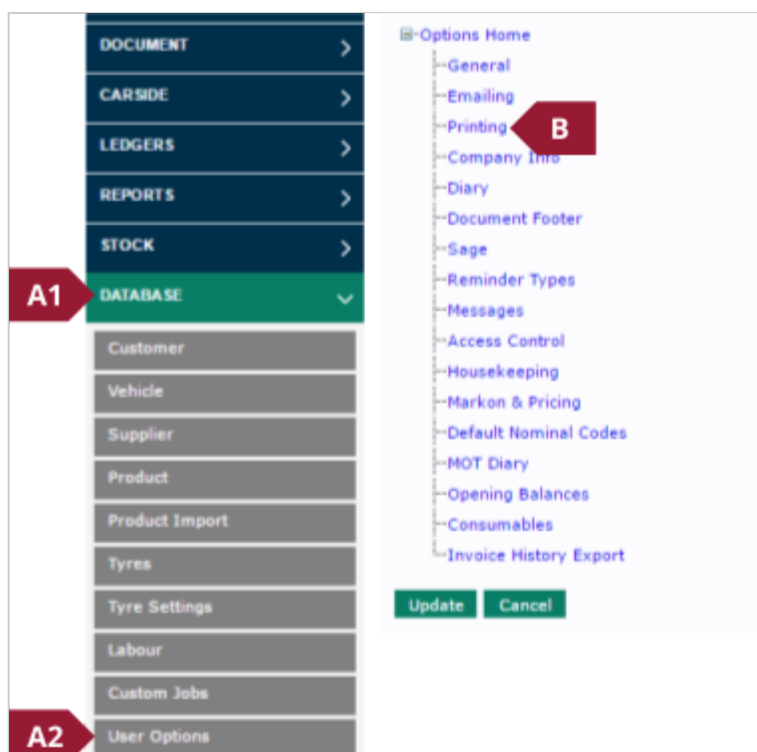


This will allow the document to be printed with the **Original** or **Current** address.

Enabling

The option can be enabled using the following process:

- A. Click the **Database** menu (A1), and then select the **User Options** option (A2).
- B. Click the **Printing** link.



- C. Scroll down the page and check the **Prompt to use current customer address when printing** checkbox.

C

Margins

	Header	Footer	
Invoice / Credit	10	10	mm
Estimate	20	20	mm
Job Card	30	30	mm
Everything Else	40	40	mm

Automatically popup print preview

☐ Estimate
 ☐ Job
 ☐ Invoice / Credit

Consolidate lines on document

☒ Show All Lines
 ☐ Minimise Labour Lines
 ☐ Minimise Parts Lines
 ☐ Minimise All Lines
 ☐ Hide Part Numbers

Labour Carried out

Parts Used

Parts Used and Labor Carried Out

Invoice Reprint

☐ Prompt to use current customer address when printing

Include Schedule of Work

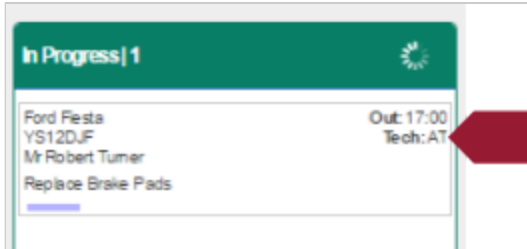
☒ Include Schedule of Work when printing split invoices

Text to include on Schedule of Work (up to 230 characters)

This is not an invoice - for reference only

Technician code is now shown on Work in Progress tiles

The initials for the assigned technician will show next to a document in the Work in Progress (WIP) screen:



Fleet labour rate is now inherited by fleet sub accounts

Unless a separate labour rate is set against a sub-account, the rate set against the Fleet Owner account will also be applied to the sub-accounts.

Custom job pop up – improved search

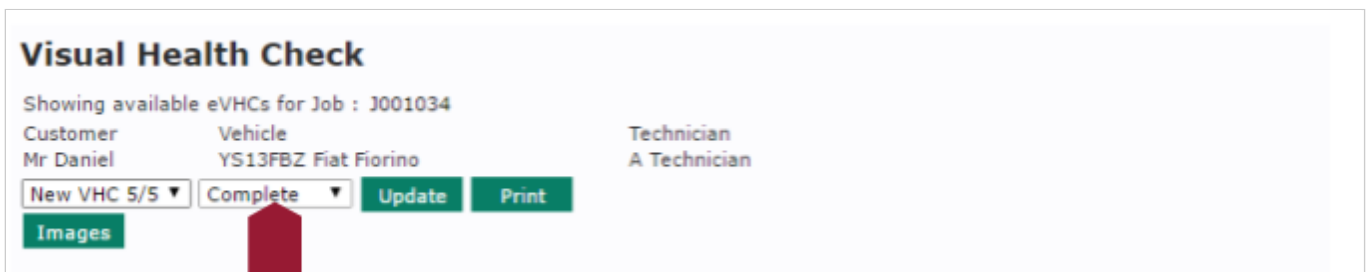
The logic used by the search feature used when adding a Custom Job in the Document tab has been improved. This now searches for results containing a phrase rather than just beginning with a phrase.

Efficiency enhancements

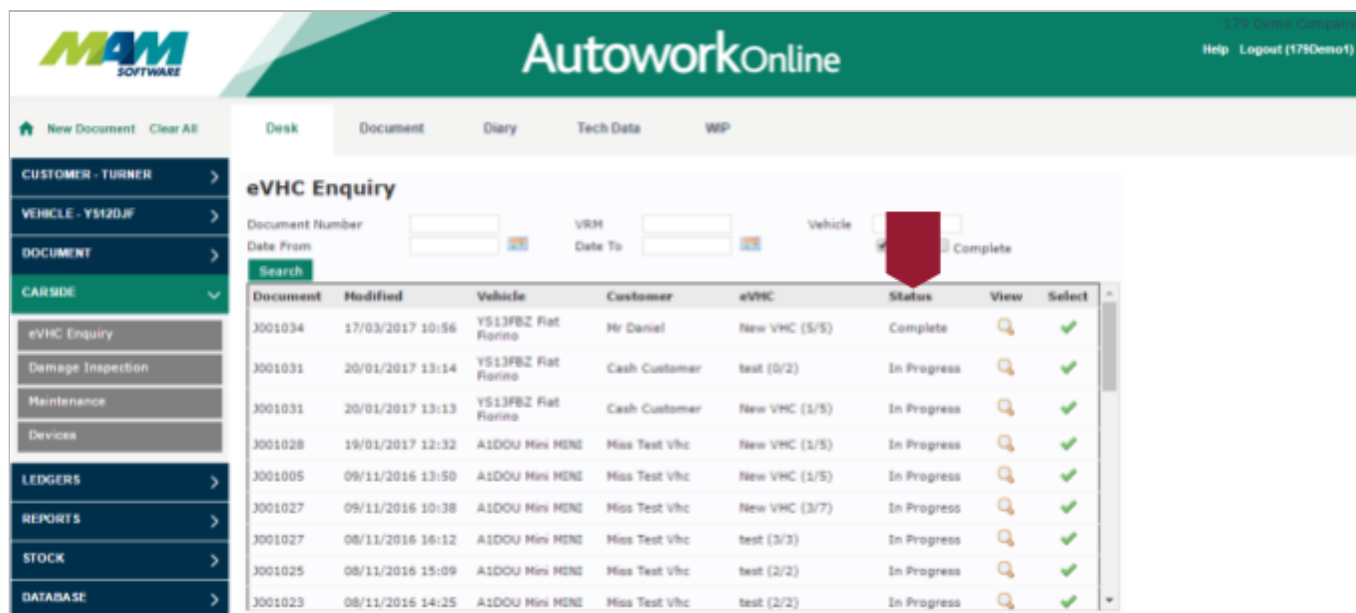
The overall efficiency and performance of the Work in Progress feature has been enhanced, as has the performance when recovering Deferred Work into the Document tab. The speed and efficiency of many areas of Autowork Online which draw data from the eVHC system (such as the eVHC Enquiry screen) has also been improved.

CarSide Status field

A new **Status** field has been added to the **eVHC Enquiry** screen. This can be used to flag the eVHC job with a particular status. This list includes four options: Not started, In Progress, On Hold, and Complete.



The Status field will also be displayed in the eVHC Enquiry screen, allowing the current status of all eVHC jobs to be viewed at a glance:



eVHC Enquiry

Document Number: VSM: Date From: Date To: Vehicle: Complete

Search

Document	Modified	Vehicle	Customer	eVHC	Status	View	Select
J001034	17/03/2017 10:56	YS13FBZ Fiat Fiorino	Mr Daniel	New VHC (5/5)	Complete		
J001031	20/01/2017 13:14	YS13FBZ Fiat Fiorino	Cash Customer	test (0/2)	In Progress		
J001031	20/01/2017 13:13	YS13FBZ Fiat Fiorino	Cash Customer	New VHC (1/5)	In Progress		
J001028	19/01/2017 12:32	A1DOU Mini MINE	Miss Test Vhc	New VHC (1/5)	In Progress		
J001005	09/11/2016 13:50	A1DOU Mini MINE	Miss Test Vhc	New VHC (1/5)	In Progress		
J001027	09/11/2016 10:38	A1DOU Mini MINE	Miss Test Vhc	New VHC (3/7)	In Progress		
J001027	08/11/2016 16:12	A1DOU Mini MINE	Miss Test Vhc	test (3/3)	In Progress		
J001025	08/11/2016 15:09	A1DOU Mini MINE	Miss Test Vhc	test (2/2)	In Progress		
J001023	08/11/2016 14:25	A1DOU Mini MINE	Miss Test Vhc	test (2/2)	In Progress		